NORTEL NETWORKS

Enterprise Edge 2.0 Call Center Reporting Set Up and Operation Guide

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How to use this guide 1

Introduction

This guide is designed to assist a System Manager in the installation, set up and operation of Enterprise Edge 2.0 Call Center Reporting. Use this guide as an ongoing reference.

This chapter tells you what to expect as you read this guide and how information in this guide is presented.

How this guide is organized

The *Enterprise Edge 2.0 Call Center Reporting Set Up and Operation Guide* is organized according to the following chapters:

How to use this guide — provides a brief overview identifying the organization of this guide.

System Overview — describes the overall functionality of Enterprise Edge 2.0 Call Center Reporting, provides a package checklist and explains the software involved.

Installing Enterprise Edge 2.0 Call Center Reporting — describes installation prerequisites and how to install the Enterprise Edge 2.0 Call Center Reporting Master Client and the Enterprise Edge 2.0 Call Center Reporting Multiple Client software from the Enterprise Edge 2.0. This chapter also provides diagnostic and recovery procedures for problems that might occur while setting up and operating Enterprise Edge 2.0 Call Center Reporting.

Using Enterprise Edge 2.0 Call Center Reporting — describes starting to use Enterprise Edge 2.0 Call Center Reporting, including Logging In and Out, and the use of the RDB Server. This chapter also explains the menu options that appear on the PC screen.

Configuring Enterprise Edge 2.0 Call Center Reporting — describes how to enter company details, how to view and change line and agent information, how to name the queues. and how to assign Passwords for the Queues. This chapter also explains how to set the statistical time bins (for use in the management reports) and how to change your password.

Wallboards — describes how to configure Enterprise Edge 2.0 Call Center Reporting to drive Wallboard displays. This chapter also explains the use of Wallboard messages, Wallboard alarms and Wallboard schedules.

Statistical Settings — explains how to tailor the analysis of the management information to suit your requirements.

Real Time Information — describes how to access and view the Real Time management information provided by Enterprise Edge 2.0 Call Center Reporting.

Management Reports — describes how to access and view the Current and Historic management information collected by Enterprise Edge 2.0 Call Center Reporting.

Index — provides an alphabetical list of information topics contained in this guide and the page number of where the information is located.

Other documents

For more information about Enterprise Edge 2.0 Call Center, refer to the following documents:

- *Enterprise Edge 2.0 Call Center Set Up and Operation Guide*
- *Enterprise Edge 2.0 Voice Software Keycode Installation Guide*

System Overview 2

Introduction

Enterprise Edge 2.0 Call Center Reporting is a Windows® software application that provides Real Time statistics and comprehensive management information on the day-to-day performance of your Enterprise Edge 2.0 Call Center system. Enterprise Edge 2.0 Call Center Reporting helps you manage the peaks and troughs in call traffic. The following Real Time information is available:

- Call waiting times
- Queue length
- Agent status

Enterprise Edge 2.0 Call Center Reporting:

- Provides a comprehensive range of management reports that has information critical for accurate business planning
- Has the ability to support multiple Wallboards which can be individually configured to display the information that the agents require

System software

The software that sends data to Enterprise Edge 2.0 Call Center Reporting is integral to Enterprise Edge 2.0 Call Center and the Enterprise Edge 2.0. The Enterprise Edge 2.0 Call Center Reporting software has two separate components: the user interface (known as the Graphical User Interface or GUI) and the RDB Server.

The user interface is used to configure Enterprise Edge 2.0 Call Center Reporting and to view the management information.

One PC on your network must be running the Enterprise Edge 2.0 Call Center Reporting Master Client software (known as the Master Client). This is the PC which communicates with the Enterprise Edge 2.0 Call Center application. The Master Client PC gathers information (called event data) from the Enterprise Edge 2.0 and stores it on the hard disk. It is this stored information which provides the data for the reports.

The RDB Server is the program used to gather and store the event data sent from the Enterprise Edge 2.0. The RDB Server must be running whenever statistical data needs to be collected. **For this reason, it is recommended that the RDB Server is operational at all times.**

There can be only one PC on your network running the Master Client software. However, so that other users may view the Enterprise Edge 2.0 Call Center Reporting Real Time screens

and access the reports, other PCs on your network may be loaded with the Enterprise Edge 2.0 Call Center Reporting Multiple Client software (known as Multiple Clients).

Multiple Client PCs communicate with the Master PC, they do not communicate with the Enterprise Edge 2.0 directly. For Multiple Clients to operate, the RDB Server must be running on the Master Client PC. **For this reason, it is recommended that the RDB Server is operational at all times.**

Both Master Client and Multiple Client PCs may be used to change the configuration of the Call Center Reporting software, to view and print reports and to display the Real Time screens.

!	**DO NOT** INSTALL BOTH SETS OF CLIENT SOFTWARE ON A SINGLE PC. ONE PC ON YOUR NETWORK SHOULD BE NOMINATED AS THE MASTER CLIENT PC. ANY OTHER PC WHICH WILL RUN THE CLIENT SOFTWARE **MUST** BE RUNNING THE MULTIPLE CLIENT SOFTWARE. NO PC MAY BE USED TO RUN TWO SETS OF SOFTWARE, AND THE MASTER CLIENT SOFTWARE MUST ONLY BE RUNNING ONA SINGLE PC ON YOUR NETWORK.

PC requirements

The minimum requirements of the PC required to run Enterprise Edge 2.0 Call Center Reporting software (either as a Master Client or Multiple Client) depends upon whether or not the PC is dedicated to running Enterprise Edge 2.0 Call Center Reporting, or if it shares its resources with other applications.

See below for the minimum requirements for your circumstances.

Minimum PC specifications:

IBM™ Compatible PC
Microprocessor speed - 120MHz (dedicated PC), 166MHz (shared PC)
RAM - 16Mb (dedicated PC), 32Mb (shared PC)
Hard disk drive space for application - 10Mb
Hard disk drive space for data (per year) - 15Mb
One free serial port, if Wallboards are used
Windows 95™ rev B (or later version) operating system
Network Interface Card
TCP/IP protocol
SVGA display

Installing Enterprise Edge 2.0 Call Center Reporting 3

Introduction

This chapter describes installation prerequisites, how to install the Enterprise Edge 2.0 Call Center Reporting Master and Multiple Client software, troubleshooting tips and the folders created on the Enterprise Edge 2.0 Master and Multiple Client PCs.

Installation prerequisites

Before you install Enterprise Edge 2.0 Call Center Reporting Master Client software, you must:

1. Be familiar with Enterprise Edge 2.0 Call Center and the Windows™ operating system.
2. Ensure that the Enterprise Edge 2.0 Call Center is installed and configured.
3. Ensure that the Enterprise Edge 2.0 is connected to and is operational on the Network to which the Enterprise Edge 2.0 Call Center Reporting Master Client PC is connected.

Now you are ready to install the Enterprise Edge 2.0 Call Center Reporting Master Client software from the Enterprise Edge 2.0.

Installing Enterprise Edge 2.0 Call Center Reporting Master Client software

Enterprise Edge 2.0 Call Center Reporting Master Client software automatically creates a folder called **\Program Files\Nortel Networks\Call Center Reporting** on the C: drive of the Master Client PC. This folder contains the application files used by Enterprise Edge 2.0 Call Center Reporting Master Client. It also contains the Call Center Reporting configuration database.

Another folder is created on the hard disk drive of the Master Client PC. The second folder is called **\Program Files\Nortel Networks\Call Center Reporting\Stats**, and contains the stored statistical data. This folder is not created on the Multiple Client PCs.

Do not rename, move or delete these folders.

Note: Before Enterprise Edge 2.0 Call Center Reporting will operate correctly, you must enable the Enterprise Edge 2.0 Call Center Reporting Software Keycode. For Software Keycode information, refer to the *Enterprise Edge 2.0 Software Keycode Installation Guide*.

TCP/IP Protocol

Enterprise Edge 2.0 and Enterprise Edge 2.0 Call Center Reporting use the industry standard TCP/IP protocol for communication between the Enterprise Edge 2.0 Call Center and the Enterprise Edge 2.0 Call Center Reporting Master Client PC, and also for communication between the Master Client PC and the Multiple Client PC(s). This means the Windows Network component is required for all Enterprise Edge 2.0 Call Center Reporting Client PCs, both for the Master Client and for the Multiple Clients.

The Enterprise Edge 2.0 Call Center Reporting installation process does not install the Windows Network component. For instructions on installing the Windows Networking component, refer to your network or Windows documentation.

Checking whether The Windows Networking Component Is Installed

To check that the Windows Network component is set up properly in order to operate as a Enterprise Edge 2.0 Call Center Reporting Master or Multiple Client PC, the following steps must be performed:

Note: If your company has a network administrator, check with your administrator before changing any network configuration parameters.

1. Start the Windows system on the PC that will have the Enterprise Edge 2.0 Call Center Reporting Client application installed.

2. On the Windows taskbar, click **Start**, point to **Settings** and then click **Control Panel**. The **Control Panel** window appears.

3. Double click on the **Network** icon . The **Network** window appears with the **Configuration** tab displayed.

4. Check that TCP/IP appears on the list of installed network components. If TCP/IP is not on the list, click **Add** to install this protocol using the Windows installation instructions, or refer to your network administrator.

Installing Enterprise Edge 2.0 Call Center Reporting Master Client

1. Exit any Windows programs that are running.

2. On the taskbar, click the **Start** button, point to **Find** and then click **Computer**.

3. The **Find: Computer** dialog box appears.

4. In the **Named** list box, type the name of the Enterprise Edge 2.0, or select the Enterprise Edge 2.0 from the list. If you do not know the name, ask your System Administrator.

5. Click the **Find Now** button.

6. The **Enterprise Edge** icon appears in the list.

7. Double-click the **Enterprise Edge** icon.

8. Double-click the **Program Files** folder.

9. Double-click the **Nortel Networks** folder.

10. Double-click the **Public** folder.

11. Double-click the **Enterprise Edge Call Center Reporting Master** folder.

12. Double-click on the **Setup.exe** file, and then click **OK**.

13. The **Nortel Networks Connects** Splash Screen and the Enterprise Edge Call Center Reporting Welcome screens appear.

14. The **Choose Destination Location** window appears.

15. Click **Next** to accept the default location. To change the directory location, click **Browse**, choose another directory location and then click **Next**.

As installation proceeds, a number of status dialog boxes appear, indicating the progress of the installation. The **Setup Complete** window appears.

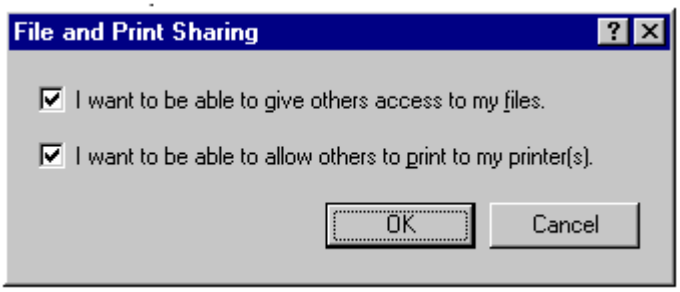
In order for Multiple Client PCs to have access to the Master Client PC, the network must be set up correctly and the Multiple Client PCs must be able to see and access the **Call Center Reporting** and **Stats** directories on the Master Client PC. There are certain settings on the Master Client PC that need to be correctly set.

Master Client PC File Sharing

To set up the Master Client PC to allow file sharing:

1. Click on the **Start** button and then click **Settings**. Select **Control Panel** and then **Network** and highlight **Client for Microsoft Networks**.

2. Click on the button marked **File and Print Sharing**.


File and Print Sharing
I want to be able to give others access to my files.
I want to be able to allow others to print to my printer(s).
OK
Cancel

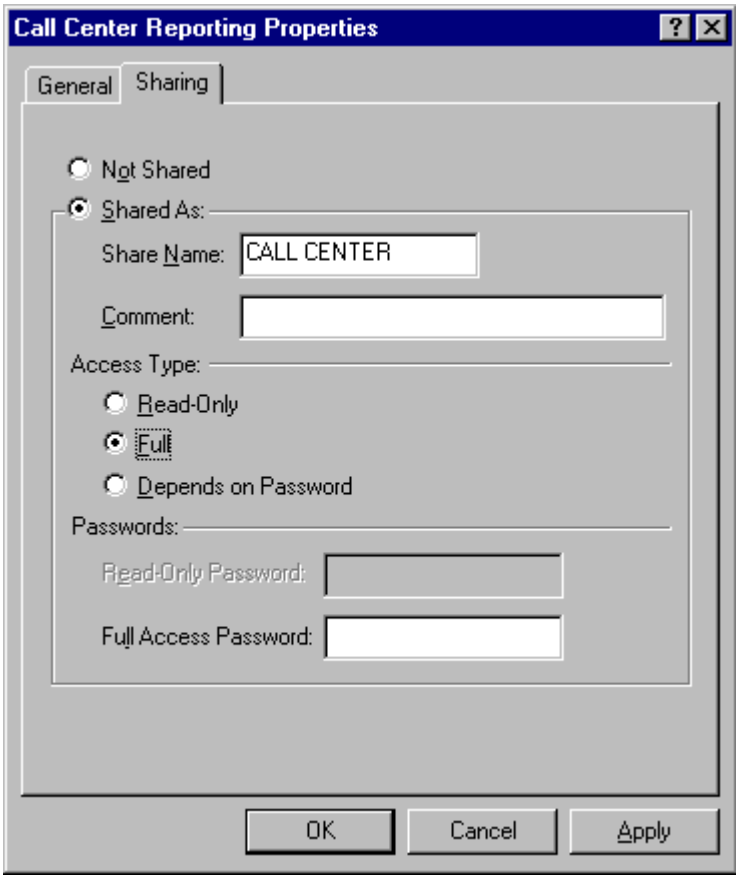
3. Click the option for File Sharing:

   "I want to be able to give others access to my files."

4. Click on the **OK** button, the computer will prompt you to restart your PC.

5. After the restart open the C: Drive of the Master PC, using Windows Explorer.

6. Right click on the folder marked **Program Files\Nortel Networks\Call Center Reporting**. One of the drop down options is **Sharing**. Click on this and you are shown the following:



7. Click **Shared As**. Make sure that the name displayed is Call Center with a single space between the word Call and the word Center and that there are no extra spaces after the word Center.

8. Under Access Type click **Full**. Leave the Password box blank.

9. Repeat steps 6 to 8 for the second folder called **Program Files\Nortel Networks\Call Center Reporting\Stats**.

   Note: Windows NT Workstation users only need to follow steps 5 to 9 above, remembering to set the type of access required in step 8 by clicking on the **Permission** button. Set Permissions to Full.

Installing Enterprise Edge 2.0 Call Center Reporting software onto additional PCs

The Enterprise Edge 2.0 Call Center Reporting Multiple Client software can be loaded onto additional PCs so that multiple Supervisors/Managers can access the information stored on the Master Client PC.

This is known as having Multiple Clients. (Also, see the sections above titled TCP/IP Protocol, and Master Client PC File Sharing.)

Installing Enterprise Edge 2.0 Call Center Reporting Multiple Client

1. Exit any Windows programs that are running.

2. On the taskbar, click the **Start** button, point to **Find** and then click **Computer**.

3. The **Find: Computer** dialog box appears.

4. In the **Named** list box, type the name of the Enterprise Edge 2.0, or select the Enterprise Edge 2.0 from the list. If you do not know the name, ask your System Administrator.

5. Click the **Find Now** button.

6. The **Enterprise Edge** icon appears in the list.

7. Double-click the **Enterprise Edge** icon.

8. Double-click the **Program Files** folder.

9. Double-click the **Nortel Networks** folder.

10. Double-click the **Public** folder.

11. Double-click the **Enterprise Edge Call Center Reporting Client** folder. Make sure you have clicked on the **Enterprise Edge Call Center Reporting Client** folder and **NOT** the **Enterprise Edge Call Center Reporting Master** folder. There can only be one PC on your network Configured as a Master Client.

12. Double-click on the **Setup.exe** file, and then click **OK**.

13. The **Nortel Networks Connects** Splash Screen and the Enterprise Edge Call Center Reporting Welcome screens appear.

14. The **Choose Destination Location** window appears.

15. Click **Next** to accept the default location. To change the directory location, click **Browse**, choose another directory location and then click **Next**.

16. As installation proceeds, a number of status dialog boxes appear, indicating the progress of the installation. The **Setup Complete** window appears.

Note: You will be asked for the Network Name of the Master Client PC during the installation of the Multiple Client software. **YOU MUST** enter the Network Name of the Master Client PC – **do not** enter the IP Address of the Master Client PC. You must enter the Network Name of the Master Client PC for the Multiple Client software to operate correctly.

Troubleshooting Enterprise Edge 2.0 Call Center Reporting

If the Master Client (including the RDB Server) is closed down and then restarted, Enterprise Edge 2.0 Call Center Reporting will have no knowledge of any Agents who are still Logged In to Enterprise Edge 2.0 Call Center, nor will it have any knowledge of any Calls which are already in progress. In other words, all of the Enterprise Edge 2.0 Call Center Queues will be considered to be in the Out Mode.

The same situation will occur if the Enterprise Edge 2.0 is closed down and restarted, and Agents Log In to Enterprise Edge 2.0 Call Center before the Master Client software has been restarted.

The solution to both of these scenarios is that for either accidental or scheduled disconnection or power down of the Enterprise Edge 2.0, the Enterprise Edge 2.0 Call Center Reporting Master Client software must be closed down.

Note: When Enterprise Edge 2.0 Call Center Reporting Master Client is restarted Agents should be told to Log Out and then Log In.

The following procedures explain how to recover from data loss between Enterprise Edge 2.0 Call Center and the Master Client PC. For each situation, perform the steps in order.

Starting or Restarting Enterprise Edge 2.0 Call Center and Enterprise Edge 2.0 Call Center Reporting Master Client

When starting the system for the first time, or intentionally restarting the system after a controlled power down:

1. Start the Enterprise Edge 2.0.
2. Start the Enterprise Edge 2.0 Call Center Reporting Master Client.

Note: Do not allow agents to log in until all steps are completed.

To recover from an unintentional close-down of the RDB Server:

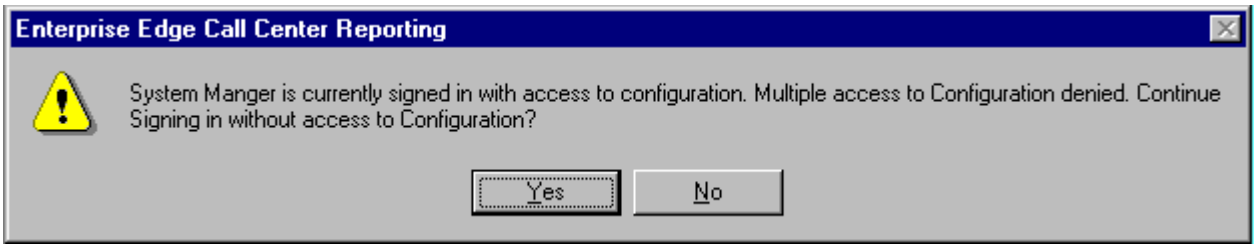
1. Shut down Enterprise Edge 2.0 Call Center Reporting Master Client.
2. Ensure that Enterprise Edge 2.0 Call Center is still running.
3. Restart Enterprise Edge 2.0 Call Center Reporting Master Client.
4. If agents are currently logged into the system, they must log out, and then log back in.

Note: Do not allow agents to log in until all steps are completed.

Starting or Restarting Enterprise Edge 2.0 Call Center and Enterprise Edge 2.0 Call Center Reporting Multiple Client

If a you have Logged In to Enterprise Edge 2.0 Call Center Reporting on a Multiple Client PC and the Enterprise Edge 2.0 has been restarted, you will have to Log Out and Exit from the Enterprise Edge 2.0 Call Center Reporting, and re-start Enterprise Edge 2.0 Call Center Reporting once the Enterprise Edge 2.0 has been re-started.

If you had selected the Access to Configuration option before the Master Client PC was re-set, you might see the following dialog box when you try to Log In again with the Access to Configuration option selected.


Enterprise Edge Call Center Reporting
System Manger is currently signed in with access to configuration. Multiple access to Configuration denied. Continue Signing in without access to Configuration?
Yes
No

Enterprise Edge Call Center Reporting Access to Configuration Denied dialog box

Check that no other users have Logged In with the Access to Configuration option selected.

If there are no other users Logged In with the Access to Configuration option selected the restriction placed on the Access to Configuration option will time-out after 15 minutes. Wait for 15 minutes and then re-try.

Folders created on the Call Center Reporting Multiple Client PCs

Unless you choose to select a different installation destination during the installation of the Enterprise Edge 2.0 Call Center Reporting Master and Multiple Client software, a folder will be automatically created on the C: drive of the PC called **\Program Files\Nortel Networks\Call Center Reporting**. This folder will contain the application files used by Enterprise Edge 2.0 Call Center Reporting.

If you do choose an alternative destination during the installation process, your folder will have the name you selected.

Do not rename, move or delete this folder.

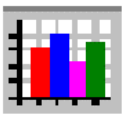
Note: There is no directory called **\Program Files\Nortel Networks\Call Center Reporting\Stats** on the PCs used to run Enterprise Edge 2.0 Call Center Reporting Multiple Clients. These PCs refer to the data in the **\Program Files\Nortel Networks\Call Center Reporting\Stats** directory on the Master Client PC in order to display statistical information.

Using Enterprise Edge 2.0 Call Center Reporting 4

Starting Enterprise Edge 2.0 Call Center Reporting

1. To start the Enterprise Edge 2.0 Call Center Reporting Master Client, double-click on the Call Center Reporting icon on the desktop of the Master Client PC

   Note: At the same time, the RDB Server will automatically open and start to collect data from Enterprise Edge 2.0 Call Center. When the RDB Server is operational an icon in the form of a bar graph will be shown on the Windows taskbar on the Master Client PC Desktop.



RDB Server taskbar icon

2. To start an Enterprise Edge 2.0 Call Center Reporting Multiple Client, double-click on the Call Center Reporting Client icon on the desktop of the Multiple Client PC. **Remember, for the Multiple Client(s) to operate correctly, the Master Client must already be running**.

Entering Enterprise Edge 2.0 Call Center Reporting (Log In)

Before you can access the configuration or management information you have to Log In to the system. For security, this process requires a User ID and a Password.

1. From the menu bar select **Level** and then click **Log-In…**, or

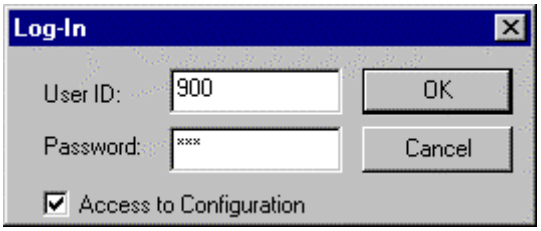
2. Click the **Log In** icon on the toolbar.

3. You must now enter a User ID number and Password. The ID number entered indicates which Queues you wish to view or administer. To be able to access all of the Queues you must enter the System Manager User ID and Password. The User ID for the System Manager is 900. To restrict your activities to only one Queue enter a Queue level (also called Supervisor level) User ID and Password. The Supervisor User Ids are 901 for Queue One, 902 for Queue Two and so on, up to 916 for Queue Sixteen.

   Note: The User IDs are pre-set at 900, 901, 902 … 916. and cannot be altered. The Passwords also default to 900, 901, 902 … 916, but the Passwords may be changed in the configuration.

With the default User IDs and Passwords, you would enter User ID 900, Password 900 to gain access to the system as the System Manager; you would enter User ID 901, Password 901 to gain access as the Supervisor of Queue One and you would enter User ID 914, Password 914 to gain access as the Supervisor of Queue Fourteen.

4. If you wish to make changes to the Configuration, click the **Access to Configuration** box. This will enable you to change the Configuration settings for the Call Center Reporting software. If you are Logging In as the System Manager (900) you will be able to change all of the Configuration settings. If you are Logging In at Queue Level (901 … 916), you will only be able to change some settings directly related to that particular Queue.



Enterprise Edge Call Center Reporting Log-In dialog box

5. Click **OK**.

Note: With the **Access to Configuration** option enabled Enterprise Edge 2.0 Call Center Reporting monitors the PC for user activity on the keyboard or the mouse. As a security precaution, after a period of 15 minutes with no activity the user is automatically logged out.

Exiting Enterprise Edge 2.0 Call Center Reporting Master Client (Log Out)

To Log Out and leave the user interface screen open:

1. Select **Level** and then click **Log-Out**.

To Log Out and close the user interface:

1. Select **Level** and click **Log-Out & Exit…**.

2. You will be prompted for the System Manager User ID and Password. If you do not enter these correctly the Master Client software will not close down.

Note: The RDB Server will remain operational even though the user interface is now closed.

Closing the RDB Server (on the Master Client PC)

1. Double click the **RDB Server** icon on the Windows taskbar. This will open the **Report Database Server** window.

2. Click **Exit**.

3. You will be prompted for the System Manager User ID and Password. If you do not enter these correctly the RDB Server will not close down.

   Note: It is recommended that the RDB Server is always operational so that statistical data from the Enterprise Edge 2.0 Call Center is continuously collected.

Call Center Reporting Main Window

The Main window opens after Log In. The features of Enterprise Edge 2.0 Call Center Reporting are accessed from this window.

The menu options which are available depend on the whether you Logged In to the System Manager level (900) or to a Queue level (901 … 916). Also, whether the System Manager selected the **Access to Configuration** option will affect the options which are available.

The level you have Logged In to is displayed in the title bar of the Main window. This reads System Manager if you have signed in as the System Manager. If you have Logged In at Queue level, the name of the Queue is shown. (If the Queue has not been given a name in the Configuration settings, then the word Queue and the Queue number will be shown, for example, Queue 8).

If you have Logged In as System Manager, and then used the **Sign-Through…** option to sign through to a Queue, for example Queue 1, and Queue1 has been named Support, the title bar would read: Enterprise Edge Call Center Reporting – Manager – Support.

By looking at the title bar of the Main Window you will always be able to tell to which level you have Logged In to or signed through to.

The following menu options are available to select:

Level

Log-In… - allows you to access configuration and management information.
Sign Through… - (System Manager level only) allows you to Log In to each of the Queues without having to Log Out from System Manager level and then Log In again using the Queue level Id and Password.
Print - allows you to print management reports.
Log-Out - allows you to exit without closing the user interface.
Log Out & Exit… - allows you to exit and close the user interface.

View

Toolbar - displays the Toolbar when selected. The toolbar consists of various shortcut icons. When the mouse pointer is positioned over an icon, a description of the icon function is displayed.
Status Bar - displays the Status Bar when selected. The status bar appears at the base of the main window and offers a description of either a shortcut icon under the mouse pointer, or an option selected from the main menu.

System (System Manager level only)

Configure - opens the main configuration window (if the **Access to Configuration** option was checked during the Log In process).
Enterprise Edge Call Center Reporting Status - opens a window that shows the Enterprise Edge 2.0 Call Center Reporting status and any diagnostic messages from the RDB Server. The Data Log can be started and stopped from this window, when advised to do so by your distributor.

Management-Info

Statistical Set up – allows you to specify settings which affect the display or reporting of information
Real Time – displays the Real Time screens to allow you to monitor the activity within, and performance of, your Call Center
Current Reports – display or print reports relating to the current hour or the current day
Historical Reports… - display or print reports relating to information gathered and stored before the current day
Abandoned Caller ID Report… - display or print the Abandoned Caller ID report (Queue level only (901 … 916)
Print Schedule… - set up automatic print schedules to have reports
Configuration Report – display or print the Configuration settings for your System (900) or Queue (901 … 916)

Window

Selecting **Window** provides a drop down menu with options to change the appearance of the windows or to close active windows.

Help

Help Topics - opens the on-line help
About Enterprise Edge Call Center Reporting… - displays the software version number and copyright information.

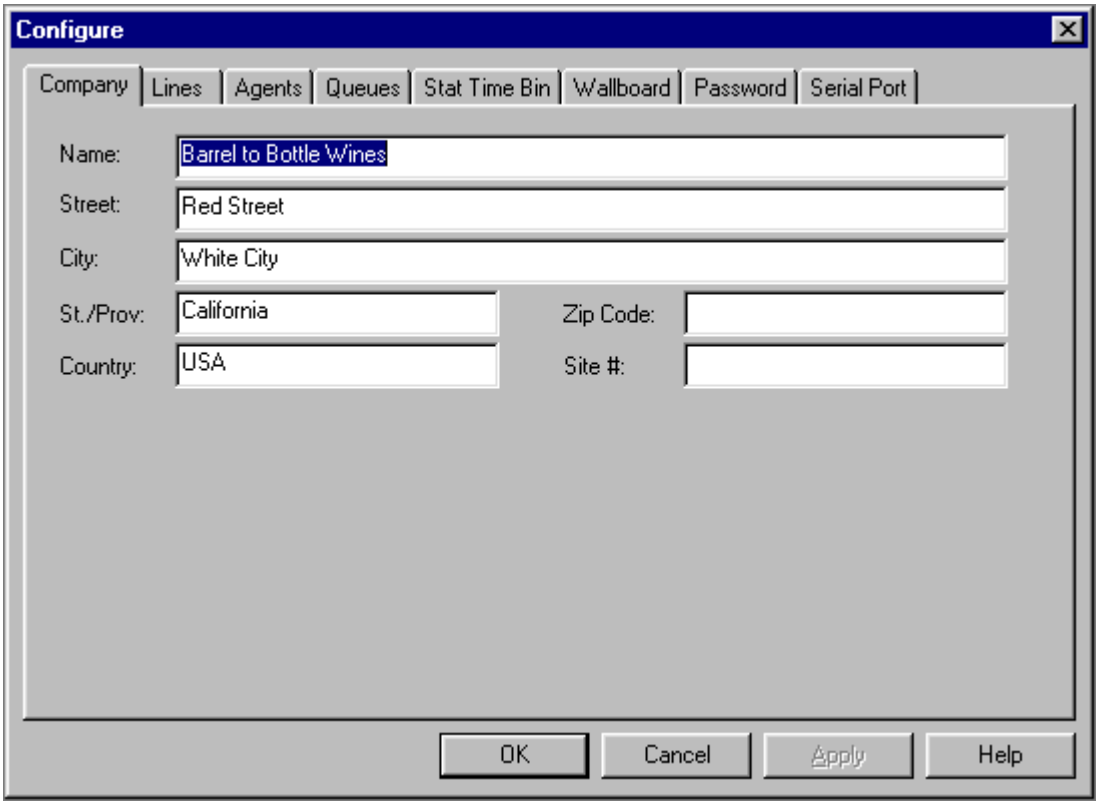
Configuring Enterprise Edge 2.0 Call Center Reporting 5

Introduction

Enterprise Edge 2.0 Call Center Reporting gathers data on events that occur within your Enterprise Edge 2.0 Call Center system. For meaningful and accurate information to be collated, Enterprise Edge 2.0 Call Center Reporting must be suitably configured. For information about your Enterprise Edge 2.0 Call Center configuration (such as line numbers) refer to the *Enterprise Edge 2.0 Call Center Programming Record* which is contained in the *Enterprise Edge 2.0 Call Center Set Up and Operation Guide*.

The configuration options can be accessed from the System Manager menu by selecting **System** and then **Configure…**.

The Configure window consists of a set of named tabs which can be selected to input, view or change the configuration.



Configure window

Configure window tabs

Company

Use this tab to enter details of your company. Your **Company Name** will be included in any printed reports.

Lines

Select this tab to add, change or delete the details of your Enterprise Edge 2.0 Call Center lines.

> **Note:** Enterprise Edge 2.0 Call Center Reporting only gathers data from the Enterprise Edge 2.0 Call Center system. The configuration does not affect the operation of the Enterprise Edge 2.0 Call Center system. Line details entered at this point are for reporting purposes only.

Adding a new line

1. Click the **Lines** tab.
2. Click **New**.
3. In the **Line Name:** box, type the name of the new line.
4. In the **Ln No:** box, enter the line number.
5. From the drop down list, select the **Queue** to which the line belongs.
6. Click **OK**.

Changing an existing line

1. From the **Lines** tab, click and highlight the line name to be edited.
2. Click **Properties**, the **Line Properties** window will open.
3. In the **Line Name:** box, change the line name as required.
4. From the **Queue** drop down list, change the Queue as required.
5. Click **OK**.

Deleting a line

1. From the **Lines** tab, click and highlight the line name to be removed.
2. Click **Remove**.

3. Click **Yes** when prompted. The line will now be removed from the Enterprise Edge 2.0 Call Center Reporting configuration.

Agents

Select this tab to add, change or delete the details of your agents.

Note: In order that Enterprise Edge 2.0 Call Center Reporting truly reflects the activity or status of the Agents it is important that the Agent Name and Agent ID you enter here correctly reflect the programming of your Enterprise Edge 2.0 Call Center system.

Adding an agent

1. Click the **Agents** tab.
2. Click **New**, the **New Agent** window will open.
3. In the **Agent Name:** box enter the name of the agent.
4. In the **Agent ID:** box enter the Agent ID number.
5. Click **OK**.

Changing an agent

1. From the **Agents** tab, click and highlight the agent to be edited.
2. Click **Properties**. The **Agent Properties** window will open.
3. Edit the Agent name as required.
4. Click **OK**.

Deleting an agent

1. From the **Agents** tab, click and highlight the agent to be removed.
2. Click **Remove**.
3. Click **Yes** when prompted. The agent details will now be removed from the Enterprise Edge 2.0 Call Center Reporting configuration.

Queues

Select this tab to give meaningful names to your Queues, and to change the default Passwords for access to the Queue Level (the Supervisor Password). If no entries are made, the queue names will default to Queue1, Queue2 and so on to Queue16, and the Passwords will default to 901, 902 … 916.

Naming the Queues

1. Click the **Queues** tab.
2. Click the Queue to be named.
3. Click **Properties**. The **Queue Properties** window will open.
4. Edit the name of the Queue.
5. Click **OK**.

Setting the Password for Logging In to the Queue in Call Center Reporting (Supervisor Password)

1. Click the **Queues** tab.
2. Click the Queue for which you wish to set the Password.
3. Click **Properties**. The **Queue Properties** window will open.
4. Click the Password tab.
5. Enter the new password in the **New Password** field. The Password must be a 3 digit number between 100 and 999.
6. You must re-enter the Password in the **Confirm Password** field.
7. Click **OK**.

Stat Time Bin

Select this tab to configure the time thresholds used in the statistical analysis of Answered and Abandoned Calls. Enterprise Edge 2.0 Call Center Reporting will provide statistical reports on the percentage of incoming calls answered and abandoned within each of your chosen Stat Time Bins. Note that the Time Bins do not show the duration of the calls, they show (Answered report) the duration of queuing time before they were answered and (Abandoned Report) the amount of queuing time before they abandoned from the queue and gave up waiting.

Wallboard

Select this tab to configure Wallboard(s). Wallboard configuration is covered in detail in Chapter 6 of this guide.

Password

Allows the System Manager Log In password to be changed from the default value of 900. The password must be a three-digit number between 100 and 999.

Note: If the password is changed from the default value and then forgotten, Enterprise Edge 2.0 Call Center Reporting must be un-installed and the

\Program Files\Nortel Networks\Call Center Reporting directory deleted, and the Enterprise Edge 2.0 Call Center Reporting software re-installed to allow you to Log In. This would reset the password back to the default value of 900.

Serial Port

If an optional Wallboard is to be attached to the Master Client PC and driven by the Enterprise Edge 2.0 Call Center Reporting a serial port (COM Port) on the Master Client PC needs to be configured to allow Enterprise Edge 2.0 Call Center Reporting to feed information to the Wallboard.

Note: If the serial port is changed at a later date, the change will not take effect until both the Enterprise Edge 2.0 Call Center Reporting and RDB Server are closed down and restarted.

Configuring the Serial Port

1. Click the **Serial Port** tab.

2. From the drop down menu select the COM port that the Wallboard will be connected to.

3. Click **OK**.

Wallboards 6

Introduction

With the addition of Enterprise Edge 2.0 Call Center Reporting your Enterprise Edge 2.0 Call Center system is further enhanced by the facility to tailor Wallboards to your requirements.

You may assign multiple Wallboards to display information relating to any of the Queues or totals for the whole Enterprise Edge 2.0 Call Center system. Enterprise Edge 2.0 Call Center Reporting will support a maximum of 16 Wallboards.

Different parameters can be displayed on each Wallboard. Wallboards can also be configured to display text messages and alarm conditions.

Wallboard installation

The Wallboard(s) must be physically installed and wired through to the Master Client PC serial port. Refer to installation documentation supplied with your Wallboard.

Note: The ID number you physically set on a new Wallboard must correspond to the Wallboard ID number that you configure in Enterprise Edge 2.0 Call Center Reporting.

Wallboard configuration

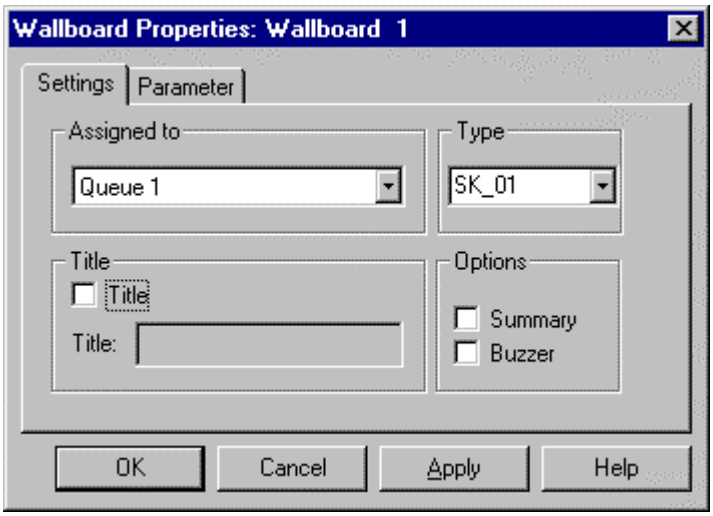
To add a Wallboard or change the settings of an existing Wallboard:

1. From the System Manager Main window, click **System**.
2. From the drop down menu select **Configure**.
3. Click the **Wallboard** tab.

   Note: The window displays each of the possible 16 Wallboards together with their current settings. If a particular Wallboard is not assigned, it will be listed as **Not Used**.

4. Click and highlight the Wallboard number required.
5. Select **Properties**.
6. A window will open with the option of selecting two tabs: **Settings** or **Parameters**

Wallboard Settings



The Wallboard Settings window

In **Settings**, you select the Queue or System to which the Wallboard is to be assigned, the type of Wallboard used, whether a Title will be displayed and whether a Summary and Buzzer will be required.

An explanation of each of the **Settings** is as follows:

Wallboard Assignment

From the drop down menu, select which option the Wallboard is to be assigned. The options are **System**, **Queue1, Queue2 … Queue16** or **Not Used**.

Wallboard Type

Enterprise Edge 2.0 Call Center Reporting supports Wallboards from both Spectrum and Shorekarn. From the drop down menu, select the make and model of Wallboard connected to Enterprise Edge 2.0 Call Center Reporting.

Wallboard Title

A Wallboard Title is a line of fixed text on the top line of two-line Wallboard. It is typically used to indicate the Queue (or System) to which a Wallboard has been assigned. A Title can be up to 16 characters long. This option is only available if a two-line type of Wallboard has been selected.

Wallboard Buzzer

The Wallboard Buzzer option ensures that whenever a Message, Alarm, Schedule or Summary is sent to the Wallboard, a buzzer will sound and prompt the agents to view the information being displayed.

Wallboard Summary

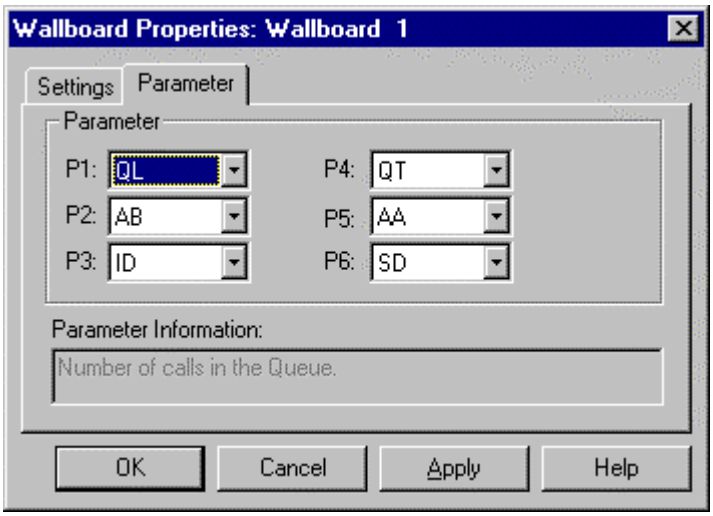
The Wallboard Summary option will automatically display information on the performance of your call center. Information is displayed on the hour, for the previous hour and for the day so far.

The Parameters displayed during a summary are:

Abbreviation	Description
IH	Total number of **I**ncoming calls for the **H**our
ID	Total number of **I**ncoming calls for the **D**ay
OH	Total number of **O**utgoing Calls for the **H**our
OD	Total number of **O**utgoing Calls for the **D**ay
AH	Total number of **A**bandoned Calls for the **H**our
AD	Total number of **A**bandoned Calls for the **D**ay
SH	Grade of **S**ervice for the **H**our
SD	Grade of **S**ervice for the **D**ay

Wallboard Parameters

To select which parameters to display on a Wallboard, click the **Parameter** tab.



The Wallboard Parameter window

Depending upon the type of Wallboard connected to Enterprise Edge 2.0 Call Center Reporting, two, three, four or six Parameters may be displayed.

The available Parameters are:

Abbreviation	Description
ID	Number of **I**ncoming calls received in the current **D**ay
IH	Number of **I**ncoming calls received in the current **H**our
AD	Number of **A**bandoned calls in the current **D**ay
AH	Number of **A**bandoned calls in the current **H**our
OD	Number of **O**utgoing calls made in the current **D**ay
OH	Number of **O**utgoing calls made in the current **H**our
SH	Grade of **S**ervice offered in the current **H**our (%)
SD	Grade of **S**ervice offered in the current **D**ay (%)
AO	Number of **A**gents on **O**utgoing calls
AI	Number of **A**gents on **I**ncoming calls
AA	Number of **A**gents **A**vailable to receive calls
AB	Number of **A**gents in the **B**usy state
AL	Number of **A**gents **L**ogged in
QL	Current **Q**ueue **L**ength / number of calls in the queue
QT	Current **Q**ueue **T**ime for the longest waiting call (secs.)

To change the Parameters to be displayed, click the drop down menu arrows and highlight your new selection.

If the Wallboard Title option is selected the Parameters on the top line are replaced with the fixed text chosen for the title of the Wallboard. This is only applicable on a two-line Wallboard.

Once a Wallboard has been allocated to either a Queue or the System, and is configured with the required Parameters, the Wallboard will immediately begin to function and display the required information.

Wallboard Messages, Alarms and Schedules

Wallboard Messages

Text Messages can be sent to your agents via the Wallboards. Messages can contain words as well as numerical information (Parameter values), and can be up to 64 characters long. When Messages are displayed they scroll from right to left until the entire Message has passed over the Wallboard at least three times. An audible Buzzer accompanies Wallboard Messages if this option is configured in the Wallboard Settings tab.

The maximum number of Messages that can be created is 32. The Messages are stored in a library, accessible from either the System or Queue level. They can be manually sent to the Wallboard(s), scheduled to be sent on a particular day and time, (Wallboard Schedule), or used in conjunction with any alarm status (Wallboard Alarm).

Creating a Wallboard Message

1. From the System Manager Main window, click **Management-Info**.

2. Select **System** or the **Queue** to which the Wallboard is assigned and the Message is to be delivered.

3. From the drop down menu select **Wallboard**. The **Message** tab shows any Messages that have been previously created.

4. Click **New.**

5. Type in the text of your Message (up to the maximum of 64 characters) in the space provided.

6. Click **OK** to save the Message.

   Note: The Real Time numerical value of any of the Parameters can be incorporated into a Message by inserting the two-letter abbreviation for the Parameter into the Message text. The Parameter must be in capitals and in brackets, e.g. (QL).

   Example: "There are (AB) agents busy"

   If there are five agents busy, the following Message will be displayed:

   "There are 5 agents busy"

   Note: It is better to put spaces in at the end of the Message so that the last word is separated from the first word when the Message repeats.

Editing a Wallboard Message

1. From the **Message** tab, click and highlight the Message to edit.

2. Click **Properties** and edit the text as required.

3. Click **OK** to save the changes.

Deleting a Wallboard Message

1. From the **Message** tab, click and highlight the Message to delete.

2. Click **Remove**.

3. Click **Yes** when prompted.

Sending Wallboard Messages

A Message can be sent manually to a Wallboard at any time.

1. From the **Message** tab, click and highlight the Message you want to send.

2. Click **Send**.

   Note: If the Message is sent from the System level, then after clicking **Send**, a dialog box will open with the option to send the Message to either the **System Wallboard** only, or to **All Wallboards**. Click the option required.

3. Click **OK** to sent the Message.

Wallboard Alarms

A Wallboard Alarm can be set up so that when a specific Parameter reaches a critical threshold either a Message is sent to the Wallboard or, if no Message is required, the alarmed Parameter on the Wallboard will flash. Wallboard Alarms can be used to alert your staff of a critical condition such as too many calls in the Queue or too many Agents in the busy state. An audible Buzzer accompanies Wallboard Alarms if this option is configured in the Wallboard Settings tab.

Creating a Wallboard Alarm

1. From the main menu, click **Management-Info**.

2. Select **System** or the **Queue** to which the Wallboard is assigned and the Alarm applies.

3. From the drop down menu select **Wallboard**. The Wallboard window will open.

4. Click the **Alarm** tab. This will show any Alarms that have been previously created.

5. Click **New**.

6. From the drop down menu option titled **Parameter**, select the Parameter that you want to use as the alarm trigger.

7. From the drop down menu option titled **Function**, choose whether the alarm is to be triggered when the Parameter value is less than or equal to (<=), equal to (=), or greater than or equal to (>=) the value entered in the **Threshold** box.

8. In the **Threshold** box, enter the numerical value that will be used to trigger the alarm.

   Note: The system knows whether the number entered in the Threshold box relates to a number, time (in seconds) or a percentage, depending upon the chosen parameter.

9. From the drop down menu option titled **Message**, select the message to be displayed when the Alarm is triggered.

   Note: If you select **No Message**, then if the Parameter is being displayed on the Wallboard when an alarm condition is triggered, the numerical value will flash.

10. Click **OK** to save the Alarm and close the window.

Editing a Wallboard Alarm

1. From the **Alarm** tab, click and highlight the Alarm to edit.
2. Click **Properties** and edit the Alarm as required.
3. Click **OK** to save the changes.

Deleting a Wallboard Alarm

1. From the **Alarm** tab, click and highlight the Alarm to be deleted.
2. Click **Remove.**
3. Click **Yes** when prompted.

Wallboard Schedules

A Wallboard Schedule is a time and day(s) when a Wallboard Message is automatically displayed on the Wallboard. Examples would be to schedule a Message to display as a weekly reminder of a fire alarm test, or to remind your agents to log-in at the start of the working day. An audible Buzzer accompanies Wallboard Schedules if this option is configured in the Wallboard Settings tab.

Creating a Wallboard Schedule

1. From the main menu, click **Management-Info**.
2. Select System or the Queue to which the Wallboard is assigned and the Schedule is to apply.
3. From the drop down menu select **Wallboard**. The **Schedule** tab shows any Schedules that have been previously created.
4. Click **New.**
5. From the drop down menu option titled **Day,** select the day(s) you want to display a Message.
6. From the drop down menu option titled **Time**, enter the time of day you want the message to be sent, using 24-hour format.

7. From the drop down menu option titled **Message**, select the Message you want to send.

8. Click **OK** to save the Schedule.

Editing a Wallboard Schedule

1. From the **Schedule** tab, click and highlight the Schedule to be edited.

2. Click **Properties** and edit Schedule as required.

3. Click **OK** to save the changes.

Deleting a Wallboard Schedule

1. From the **Schedule** tab, click and highlight the Schedule to be deleted.

2. Click **Remove.**

3. Click **Yes** when prompted.

Statistical Settings 7

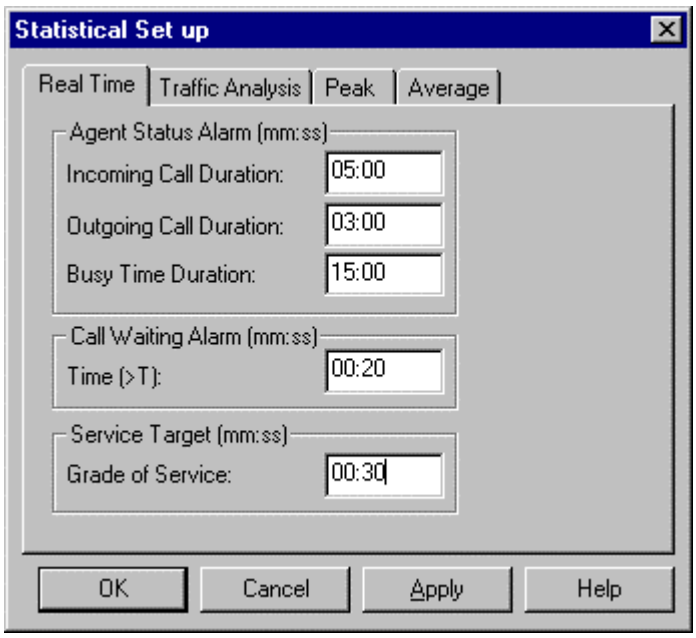
Introduction

The presentation of information in the Real Time screens, and the analysis of data collected by Enterprise Edge 2.0 Call Center Reporting for the management reports, can be tailored to suit your requirements.

Statistical Set Up

1. From the main menu, click **Management-Info**.

2. Select **Statistical Set Up**.



The Statistical Set Up window (Queue level)

Note: The **Call Waiting Alarm** threshold setting and the **Service Target** threshold settings in the **Real Time** tab are only applicable at Queue level. They do not appear at the System level.

3. Enter the setting required in each of the tabs and click **OK**.

The options available in Statistical Set Up are explained in detail overleaf:

Real Time tab

Agent Status Alarm

The times input into the first three boxes are used to alert a System manager when an agent has been on an activity longer than required. The alarm condition is shown on the Real Time screens by changing the color of the agent in that state to red, after the time duration is exceeded.

Use the tab key to move between each of the three boxes to enter the alarm times for Incoming Calls, Outgoing Calls and Busy. Enter the times in the format: mm:ss.

Call Waiting Alarm

If any incoming call waits longer to be answered than this alarm time, Time (>T), then the waiting call will appear in red on the Real Time screens. This setting is also shown in the management reports produced by Enterprise Edge 2.0 Call Center Reporting. It is good working practice for the time entered here to be the same as the Primary Alert in Enterprise Edge 2.0 Call Center programming. This ensures that when an alarm condition exists in the Enterprise Edge 2.0 Call Center, that alarm condition is also reported by Enterprise Edge 2.0 Call Center Reporting.

Service Target

This time is used to calculate the Grade of Service figure. It is good working practice for the time entered here to be the same as the Secondary Alert in Enterprise Edge 2.0 Call Center programming. The Grade of Service figure is displayed in the Real Time screens, and is shown in many of the management reports.

The Grade of Service figure is shown as a percentage of calls answered within the target time, and quantifies the level of service offered to incoming callers.

Traffic Analysis tab

This option allows for the information in the Call Profile Report and Summary Report to be displayed in increments of either ½ hour or one hour time periods.

Peak tab

This option allows for the statistical peaks, recorded in the Summary Report to be automatically reset. The option can be disabled or reset on either a weekly, monthly or yearly basis.

Average tab

This option enables the statistical averages, recorded in the Summary Reports to be automatically reset. The option can be disabled or reset on either a weekly, monthly or yearly basis.

Real Time Information 8

Introduction

Enterprise Edge 2.0 Call Center Reporting provides comprehensive Real Time management information that is constantly updated approximately every 3 seconds. The Real Time screens reflect the current status of the agents and the Enterprise Edge 2.0 Call Center lines. This dynamic feedback empowers a System manager to more effectively manage the performance of the call center.

Real Time Information can be viewed at either System Level or at Queue Level.

System Level - shows the real time status and performance of lines and agents across all Queues of the Enterprise Edge 2.0 Call Center system.

Queue Level - shows the real time status and performance of lines and agents in a single Queue.

Real Time screens

System level

From the System Manager menu, click **Management-Info**, then select the **Real Time** option.

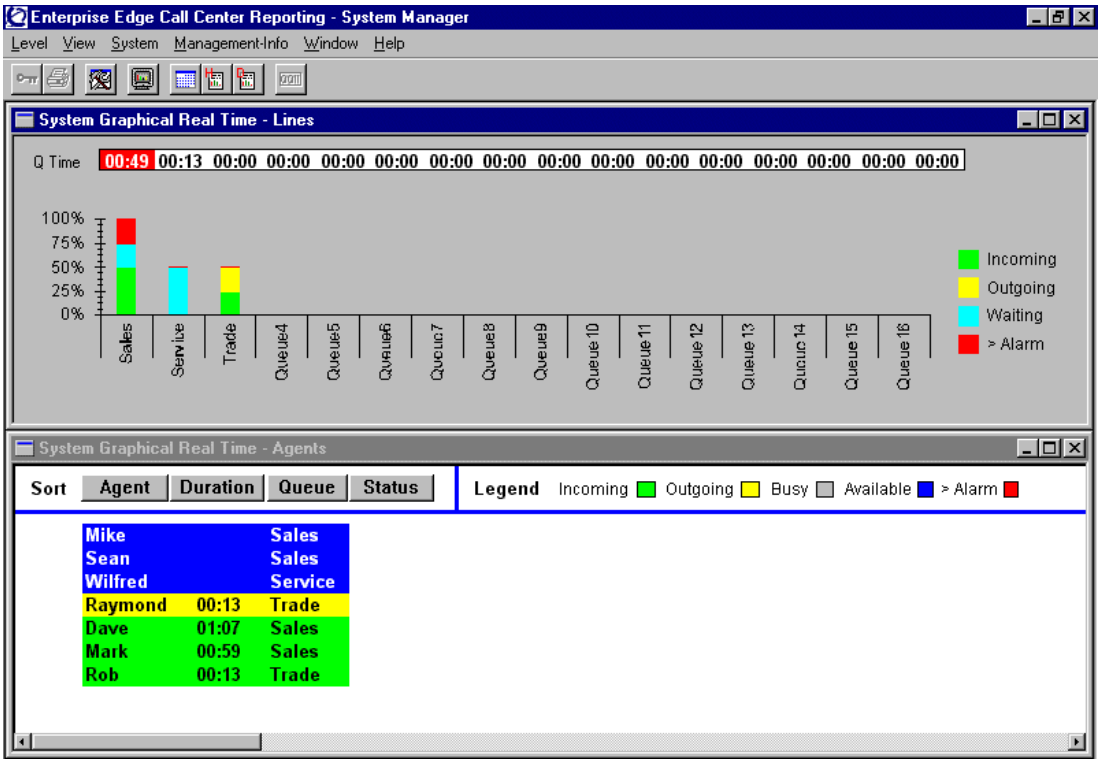
Selecting the **Real Time** option opens four windows (only two of which can be seen immediately). The first two windows display information in a graphical format. A color-coded key explains the different states. To view the information in a numerical format, minimise or close the two graphical windows.

System Graphical Real Time - Lines - provides a view of the status of all of the lines in each of the Queues. The longest waiting call duration in each Queue is also shown (Q Time).

System Graphical Real Time - Agents – provides a tabular view of the status of all of the Agents, in all of the Queues. Agent name, status duration, queue name or current status can be used to sort the agents.

System Numerical Real Time - Lines - provides a numerical representation of the line related information.

System Numerical Real Time - Agents - provides a numerical representation of the agent related information and the service level currently being offered by each Queue.

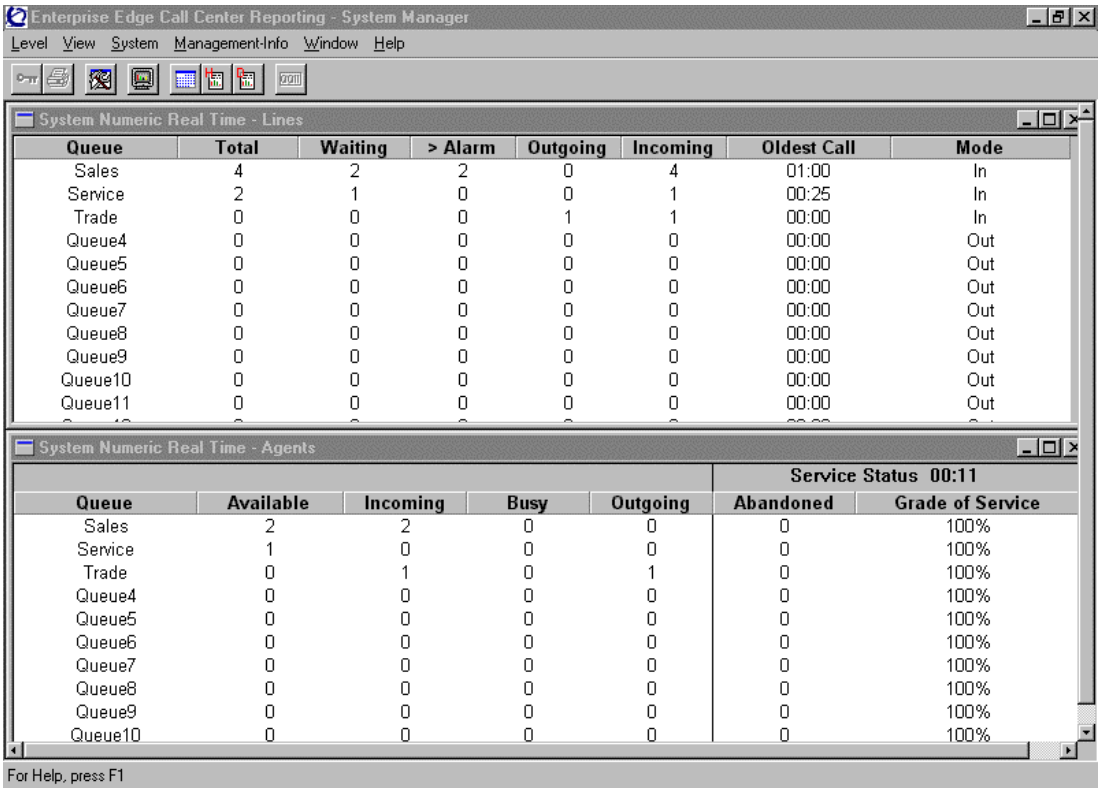


System level – Graphical Real Time Screen

The information displayed in the graphical windows includes:

System Graphical Real Time – Lines
Queue time of longest waiting call
Number of lines with incoming calls
Number of lines with outgoing calls
Number of lines with calls waiting
Number of lines with calls waiting > alarm
Number of lines available for calls

System Graphical Real Time - Agents
Names of all agents logged in
Status of all agents logged in
Status duration of all agents logged in
Queue name to which each agent belongs


Enterprise Edge Call Center Reporting - System Manager
Level View System Management-Info Window Help
System Numeric Real Time - Lines
Queue | Total | Waiting | > Alarm | Outgoing | Incoming | Oldest Call | Mode
Sales 4 2 2 0 4 01:00 In
Service 2 1 0 0 1 00:25 In
Trade 0 0 0 1 1 00:00 In
Queue4 0 0 0 0 0 00:00 Out
Queue5 0 0 0 0 0 00:00 Out
Queue6 0 0 0 0 0 00:00 Out
Queue7 0 0 0 0 0 00:00 Out
Queue8 0 0 0 0 0 00:00 Out
Queue9 0 0 0 0 0 00:00 Out
Queue10 0 0 0 0 0 00:00 Out
Queue11 0 0 0 0 0 00:00 Out
System Numeric Real Time - Agents
Service Status 00:11
Queue | Available | Incoming | Busy | Outgoing | Abandoned | Grade of Service
Sales 2 2 0 0 0 100%
Service 1 0 0 0 0 100%
Trade 0 1 0 1 0 100%
Queue4 0 0 0 0 0 100%
Queue5 0 0 0 0 0 100%
Queue6 0 0 0 0 0 100%
Queue7 0 0 0 0 0 100%
Queue8 0 0 0 0 0 100%
Queue9 0 0 0 0 0 100%
Queue10 0 0 0 0 0 100%
For Help, press F1

System level – Numerical Real Time Screen

The information displayed in the numerical windows includes:

System Numerical Real Time - Lines
Queue name
Total number of available lines
Number of calls waiting
Number of calls waiting > alarm
Number of outgoing calls in progress
Number of incoming calls in progress
Queue time for the oldest waiting call
The mode of operation (In or Out)

System Numerical Real Time - Agents
Queue name
Number of agents currently available
Number of agents on incoming calls
Number of agents in the busy state
Number of agents on outgoing calls
Number of abandoned calls (15 min period)
Grade of Service offered (15 min period)

Queue level

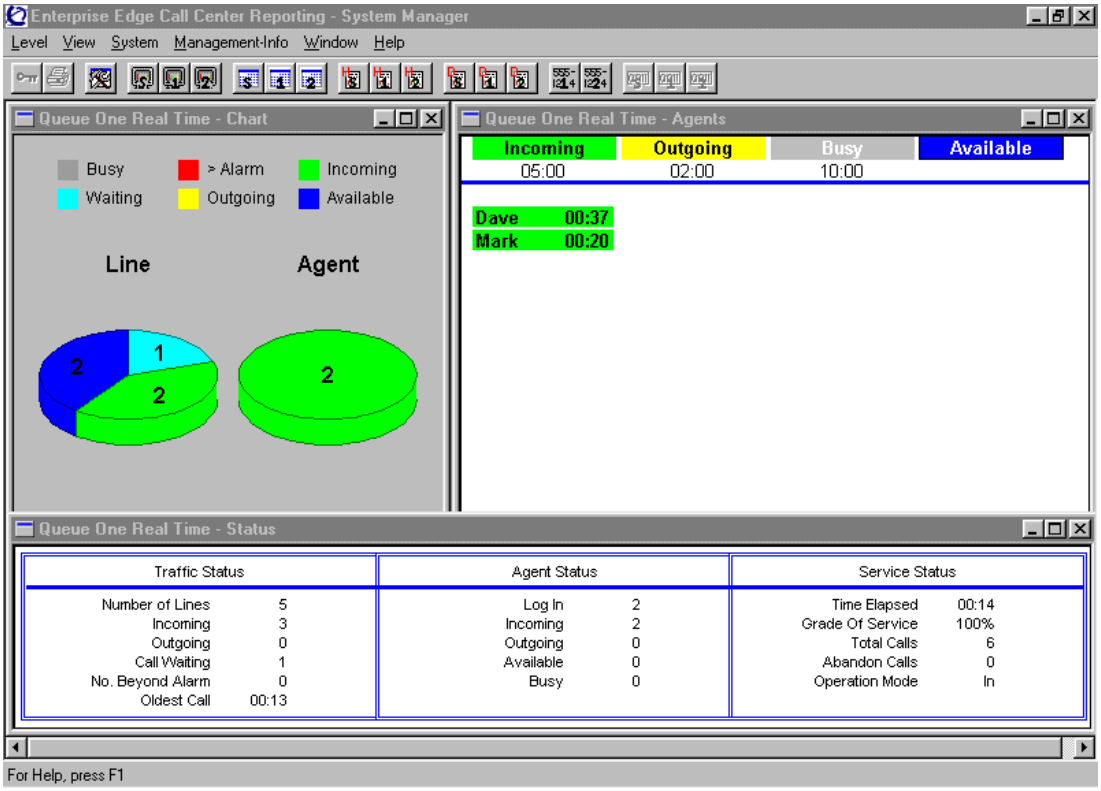
If you have Logged In at Queue Level (901 … 916) or have used the **Signed-Through** option from the System Manager level to a Queue level, you can display the Queue level Real Time screens as follows. From the Main window menu, click **Management-Info,** then select **Real Time** .

Selecting the **Real Time** opens three Windows.

Queue # Real Time - Chart - provides a pie chart view of the current status of all lines and agents in the Queue.

Queue # Real Time - Agents - provides a graphical status of all agents in the Queue with the current duration.

Queue # Real Time - Status - provides numerical information on the status of the traffic on the lines, agent activity and level of service being offered.



Queue level - Real Time Screen

The information displayed in the **Queue # Real Time - Chart** window includes:

Queue # Real Time - Chart
Number of lines on incoming calls
Number of lines on outgoing calls
Number of lines with calls waiting
Number of lines with calls waiting > alarm
Number of lines available for calls
Number of agents on incoming calls
Number of agents on outgoing calls
Number of agents busy
Number of agents available to take calls

The information displayed in the **Queue # Real Time - Agents** window includes:

Queue # Real Time - Agents
Names of all agents on incoming calls and the duration (minutes and seconds)
Names of all agents on outgoing calls and the duration (minutes and seconds)
Names of all agents who are busy with the duration (minutes and seconds)
Names of all agents who are available to take calls

The **Queue # Real Time - Status** window shows three boxes containing the following information:

Traffic Status
Total number of lines allocated to the Queue.
Number of incoming calls currently being received on these lines
Number of outgoing calls being made on these lines
Number of incoming calls waiting to be answered.
Number of calls waiting > alarm time threshold.
Waiting time of the oldest call in the Queue (minutes and seconds).

Agent Status
Number of agents logged in to the Queue
Number of agents currently on incoming calls
Number of agents currently on outgoing calls
Number of agents currently available to take calls
Number of agents who have made themselves busy

Service Status
Time elapsed during the current 15 minute analysis period
Grade of Service currently being offered to callers in this Queue
Number of incoming calls received in this 15 minute analysis period
Number of calls that have abandoned in this 15 minute analysis period
The mode of operation of the Queue (In or Out)

Management Reports 9

Introduction

Enterprise Edge 2.0 Call Center Reporting automatically collects and collates statistical data from Enterprise Edge 2.0 Call Center. From this data, Enterprise Edge 2.0 Call Center Reporting produces a comprehensive range of management reports to help you manage the performance of your call center.

The reports are updated and stored on the hard disk of your PC and can be viewed on the screen or printed as a hard copy. The information can be accessed from the two operational levels:

- **System level** - these reports provide information on the performance of the complete Enterprise Edge 2.0 Call Center system. The reports show the totals for each Queue.

- **Queue level** - these reports provide information on the performance of individual Queues. The reports show the details for each individual line and individual agent in the Queue.

The operational level of the reports which you can see or print is dictated by the level into which you have Logged In.

If you Logged In as the System Manager (900) then you will be able to access reports at the System level, and, by using the Sign-Through option you will be able to access reports at the Queue level too.

If you Logged In to a Queue Level (901 … 916) you will be able to access reports at the Queue level only, and only for the Queue into which you have Logged In.

The ability to select either the current day's information (Current Reports) or a period of time now passed (Historic Reports) can further define the reports. In fact, any individual hour, day, week or month can be viewed using the Enterprise Edge 2.0 Call Center Reporting package.

Accessing Current Reports

Current Reports provide you with data for either the current hour or the current day to date. They may be viewed on screen, and printed if required.

To access a Current Report:

1. Click **Management-Info** from the Main window.

2. Select **Current Reports**.

3. Click **Hourly…**, or **Daily…**as required.

The Report Manager window will now open and the title bar will reflect your selection. Refer to the section on Report Manager later in this chapter for details on how to view individual reports.

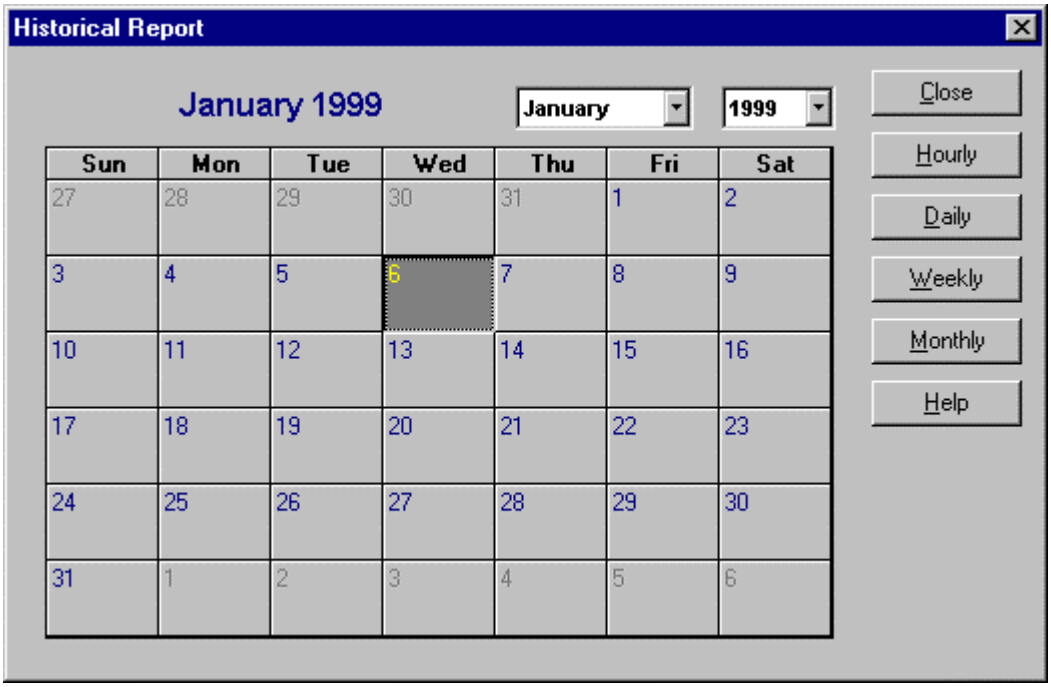
Accessing Historical Reports

Historical Reports relate to time periods outside of the current day. The time period required is selected from a calendar.

To access a Historical Report:

1. Click **Management-Info** from the Main window.

2. Click **Historical Reports…**. The **Historical Report** calendar window will open with the current month displayed.



The Calendar window

3. Select the month required from the drop down menu.

4. Select the year required from the drop down menu.

5. Select the time period from the following list of options:

- To view reports for an individual hour, click the day required and then click the **Hourly** button. You will be presented with a list of hours for which there is data. Click your selection, and then click **OK**.

- To view reports for a whole day, click the day required and then click the **Daily** button.

- To view reports for a whole week, click on any day in that week and then click the **Weekly** button.

- To view reports for a whole month, click on any day in that month and then click the **Monthly** button.

  Note: These buttons will only be highlighted and available to select if statistical data is stored for that time period.

After selecting the required time period, the Report Manager window will open and the title bar will reflect your selection. Refer to the next section on Report Manager for details on how to view individual reports.

Report Manager window

The Report Manager window allows different management reports, in different formats, to be selected and viewed on the screen. Reports can also be printed from this window. The Report Manager menu bar offers the following options:

File

Print… - allows you to print management reports.
Close - closes the Report Manager window.

View

Graph - allows you to view and open report in a graphical format (if available).
Numeric - allows you to view and open report in a numerical format.

Report

This option displays a list of all the reports available for you to view. This list will depend on whether or not you selected to view information for a Queue or the System. The full list is as follows:

- **Answered Call**
- **Abandoned Call**
- **Incoming Call**
- **Agent Activity**
- **Average Time**
- **System Capacity**
- **Call Profile**
- **Agent Profile**
- **Summary**

Window

Selecting **Window** provides a drop down menu with options to change the appearance of the windows or to close active windows.

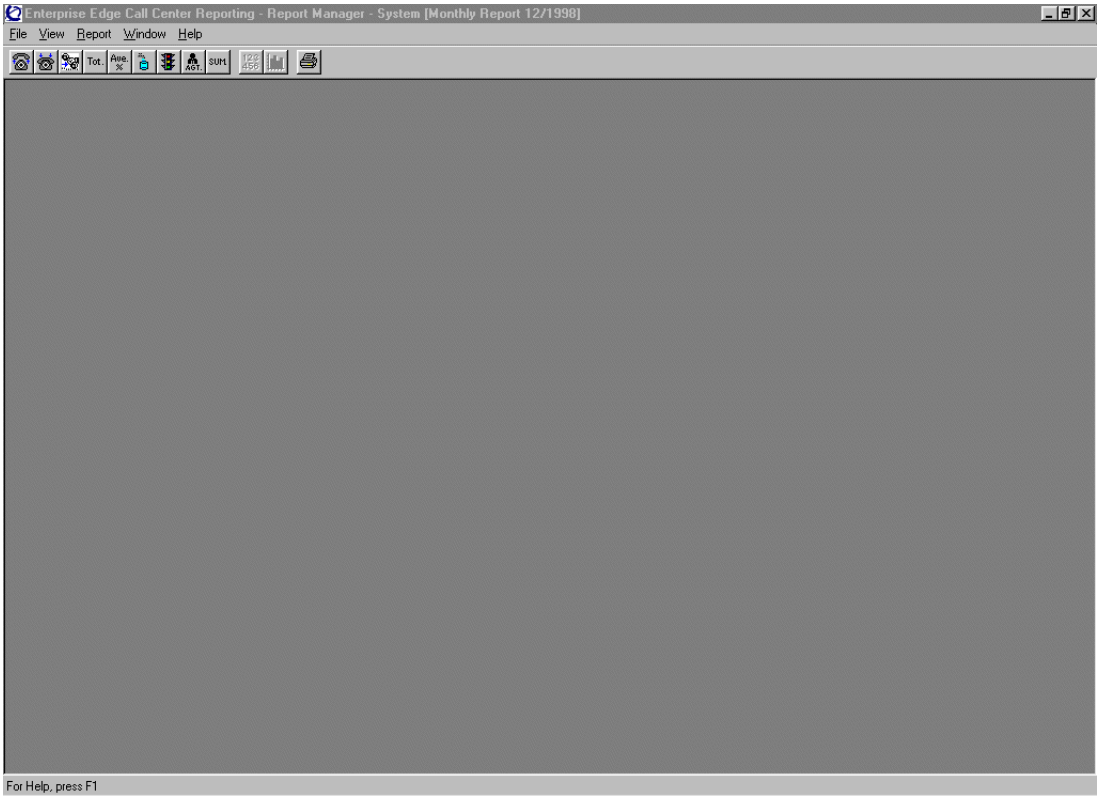
Help

Help Topics - opens the on-line help
About Enterprise Edge Call Center Reporting… - displays the software version number and copyright information.

Beneath the Report Manager main menu bar is a row of icons, which are shortcuts to the various options. When the mouse pointer is positioned over the top of an icon, a text box will appear with a description of its use.

Viewing Reports

Reports are viewed from the Report Manager window. The available reports are shown when the **Report** option is selected. To view the required report, click the title of the report required.


Enterprise Edge Call Center Reporting - Report Manager - System [Monthly Report 12/1998]
File View Report Window Help
For Help, press F1

The Report Manager window

By default all reports open in numerical format. Some reports are also available in a graphical format, and this can be selected by clicking **View** and then **Graph**.

Selecting **Numeric** from the **View** menu option changes the report back to a numerical format again.

Note: The Answered Call, Abandoned Call, Incoming Call, Call Profile and Summary reports can all be viewed in both numerical and graphical formats.

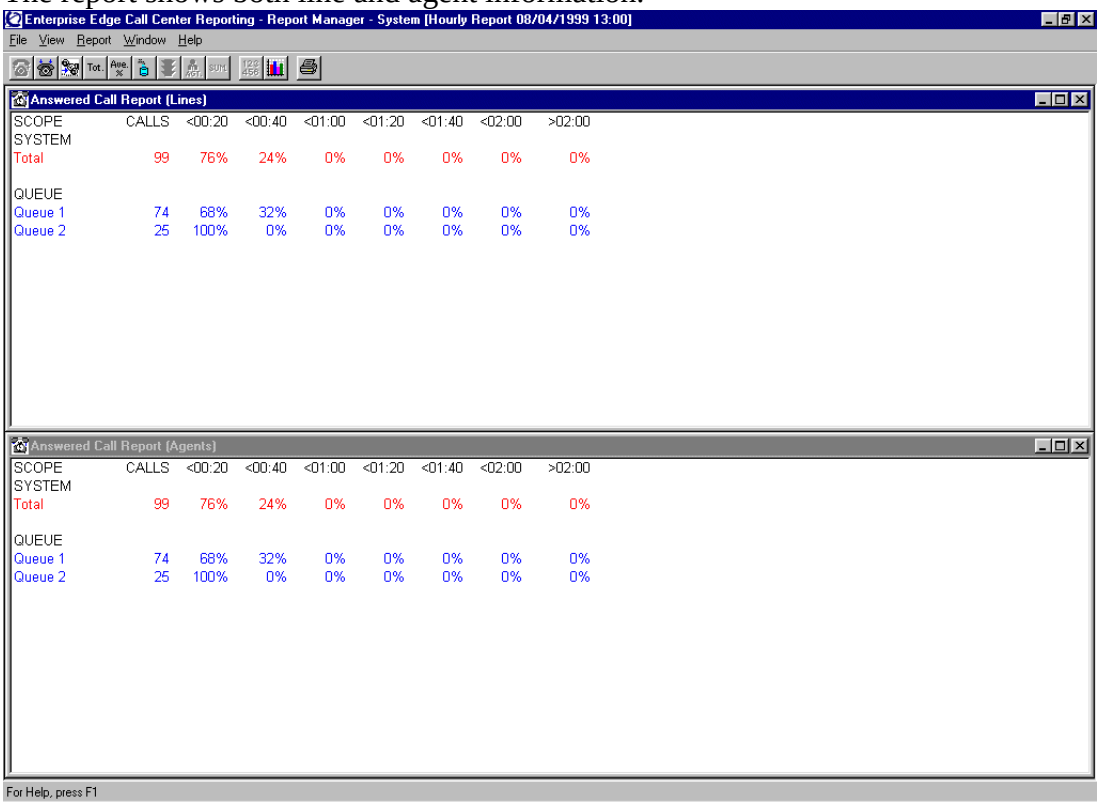
Reports viewed at a System level will show information summarising the totals for each Queue. Reports viewed from a Queue level provide more detailed information, showing individual lines and individual agents.

If a report contains information relating to both lines and agents, two windows will be displayed split equally across the screen. Some reports may contain more information than can be displayed on the screen at one time. In this case click inside the report window to activate the scroll bar. The scroll bar appears on the right-hand side of the window.

Report Types

Answered Call

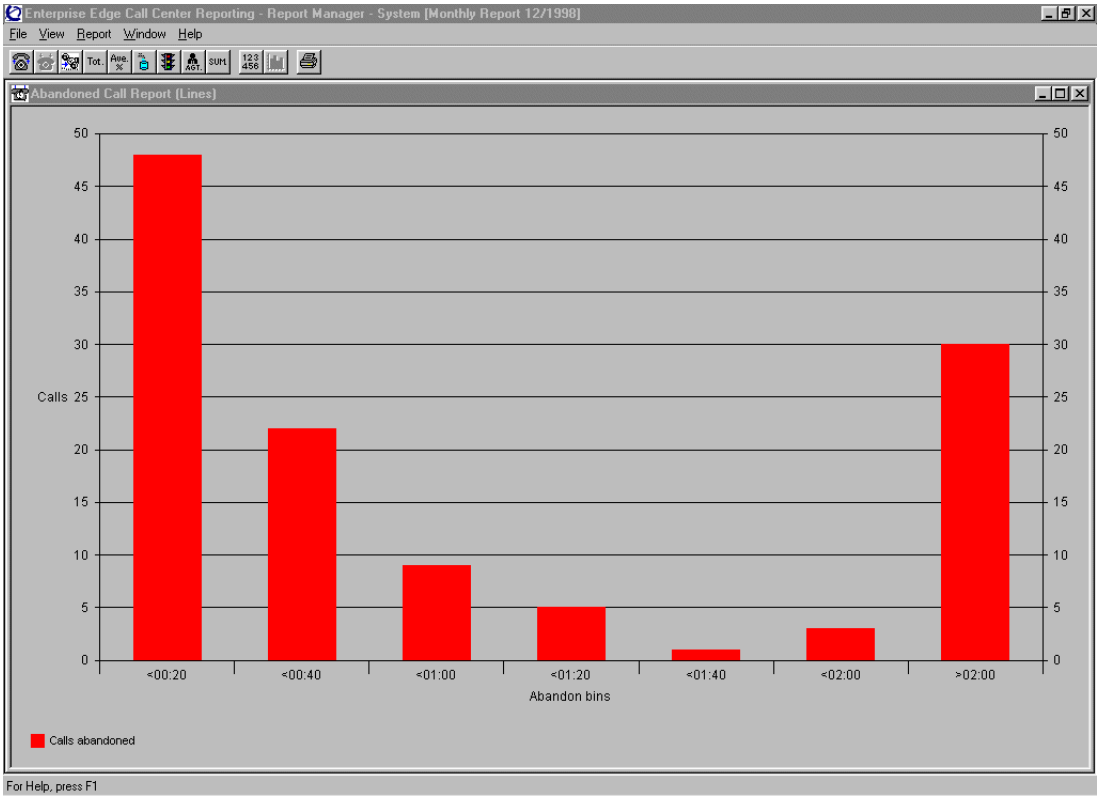
The **Answered Call** Report shows the total number of calls that were answered, and the percentage of calls that were answered in the time frames configured in the Answer Time Bins. The report shows both line and agent information.


Enterprise Edge Call Center Reporting - Report Manager - System [Hourly Report 08/04/1999 13:00]
File View Report Window Help
Answered Call Report (Lines)
SCOPE CALLS <00:20 <00:40 <01:00 <01:20 <01:40 <02:00 >02:00
SYSTEM
Total 99 76% 24% 0% 0% 0% 0% 0%
QUEUE
Queue 1 74 68% 32% 0% 0% 0% 0% 0%
Queue 2 25 100% 0% 0% 0% 0% 0% 0%
Answered Call Report (Agents)
SCOPE CALLS <00:20 <00:40 <01:00 <01:20 <01:40 <02:00 >02:00
SYSTEM
Total 99 76% 24% 0% 0% 0% 0% 0%
QUEUE
Queue 1 74 68% 32% 0% 0% 0% 0% 0%
Queue 2 25 100% 0% 0% 0% 0% 0% 0%
For Help, press F1

Answered Call Report – Numerical View (System level)

Abandoned Call Report

The **Abandoned Call** Report shows the total number of calls that had abandoned, and the percentage of calls that had abandoned in the time frames configured in the Abandon Time Bins. Only line information is shown, as these calls had abandoned prior to being answered by agents.

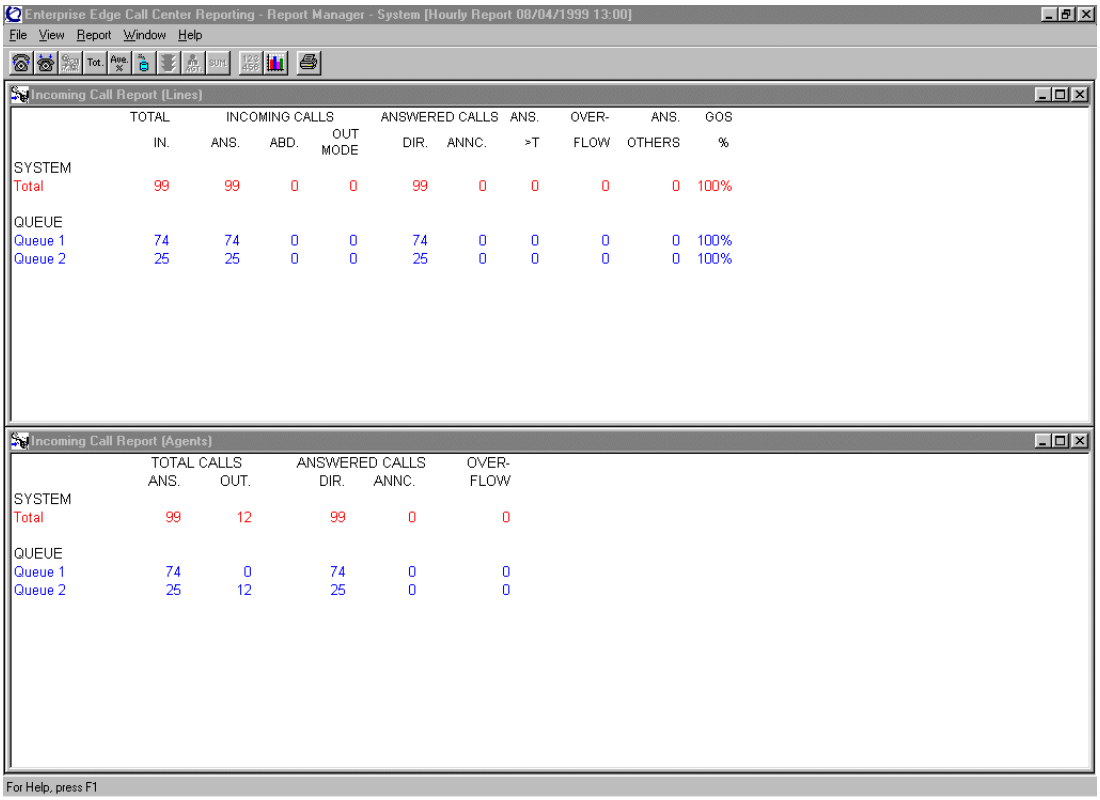


Abandoned Call Report – Graphical View

Incoming Call Report

The **Incoming Call** Report shows how your call center handles incoming calls.

It shows the calls answered directly by agents, those answered first by the announcement and queuing system of the Enterprise Edge 2.0 Call Center, and any calls that abandoned. The report shows both line and agent information.


Enterprise Edge Call Center Reporting - Report Manager - System [Hourly Report 08/04/1999 13:00]
File View Report Window Help
Incoming Call Report (Lines)
TOTAL IN. | INCOMING CALLS ANS. | ABD. | OUT MODE | ANSWERED CALLS DIR. | ANNC. | ANS. >T | OVER-FLOW | ANS. OTHERS | GOS %
SYSTEM
Total 99 99 0 0 99 0 0 0 0 100%
QUEUE
Queue 1 74 74 0 0 74 0 0 0 0 100%
Queue 2 25 25 0 0 25 0 0 0 0 100%
Incoming Call Report (Agents)
TOTAL CALLS ANS. | OUT. | ANSWERED CALLS DIR. | ANNC. | OVER-FLOW
SYSTEM
Total 99 12 99 0 0
QUEUE
Queue 1 74 0 74 0 0
Queue 2 25 12 25 0 0
For Help, press F1

Incoming Call Report – Numerical View (System level)

The line information includes:

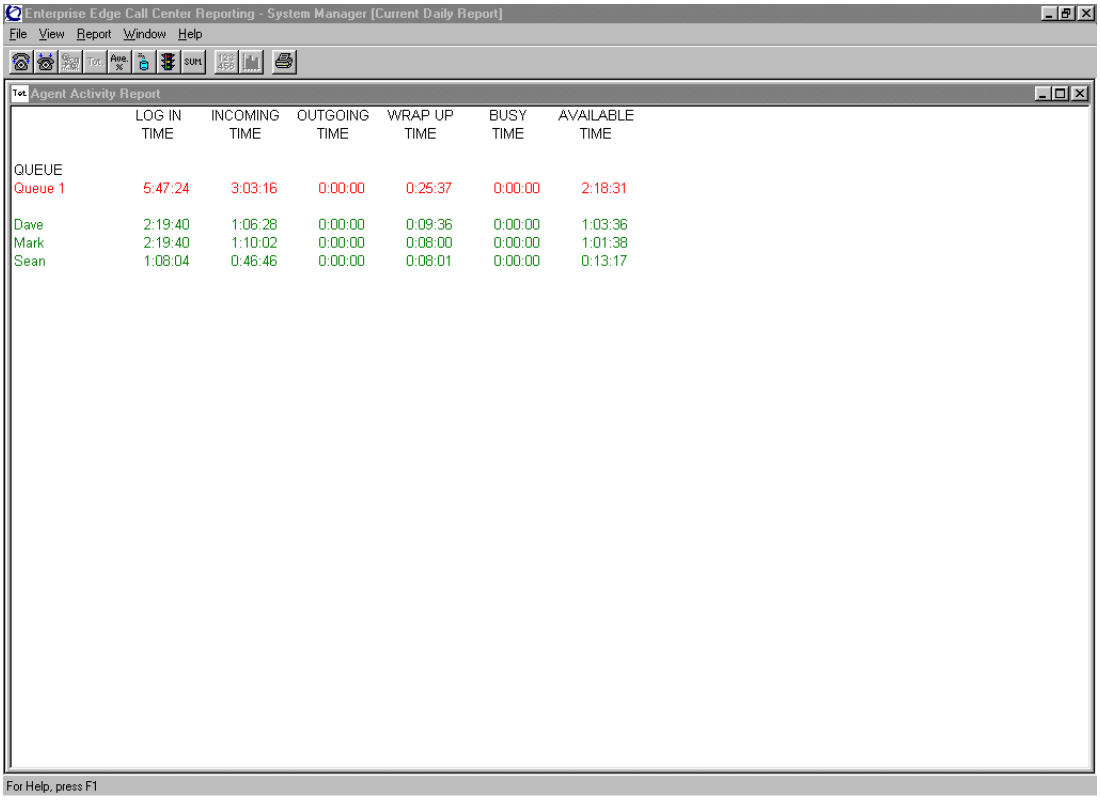
Title	Description
TOTAL IN	Total number of incoming Enterprise Edge 2.0 Call Center calls.
INCOMING CALLS - ANS.	Number of incoming calls answered.
INCOMING CALLS - ABD.	Number of incoming calls that abandon.
INCOMING CALLS - OUT	Number of incoming calls received during the “out” mode of operation.
ANSWERED CALLS - DIR.	Number of incoming calls answered directly by agents (no announcement).
ANSWERED CALLS - ANNC	Number of incoming calls answered after waiting (with an announcement).
ANS.>T	Number of incoming calls answered that wait longer than the alarm time.
OVERFLOW	Number of incoming calls that overflow to the other Queue.
ANS. - OTHERS	Number of incoming calls answered by non-Enterprise Edge 2.0 Call Center extensions.
G.O.S.	The Grade of Service being offered to incoming callers.

The agent information includes:

Title	Description
TOTAL CALLS - ANS	Total number of incoming calls answered by agents.
TOTAL CALLS - OUT.	Total number of outgoing calls made by agents.
ANSWERED CALLS - DIR.	Number of incoming calls answered directly by agents (no announcement).
ANSWERED CALLS - ANNC.	Number of incoming calls answered by agents after waiting (with an announcement).
OVER-FLOW	Number of incoming calls answered by agents that overflowed in from the other Queue.

Agent Activity Report

The **Agent Activity** Report shows the total amount of time that agents spend logged in to Enterprise Edge 2.0 Call Center, and the proportion of that time spent on activities such as incoming calls, outgoing calls and in the Busy state. The agent window is the only window displayed, as there is no line information associated with this report. When viewed from a Queue level, individual agent details are displayed. Queue totals are available from the System level.


Enterprise Edge Call Center Reporting - System Manager [Current Daily Report]
File View Report Window Help
Agent Activity Report
LOG IN TIME
INCOMING TIME
OUTGOING TIME
WRAP UP TIME
BUSY TIME
AVAILABLE TIME
QUEUE
Queue 1 5:47:24 3:03:16 0:00:00 0:25:37 0:00:00 2:18:31
Dave 2:19:40 1:06:28 0:00:00 0:09:36 0:00:00 1:03:36
Mark 2:19:40 1:10:02 0:00:00 0:08:00 0:00:00 1:01:38
Sean 1:08:04 0:46:46 0:00:00 0:08:01 0:00:00 0:13:17
For Help, press F1

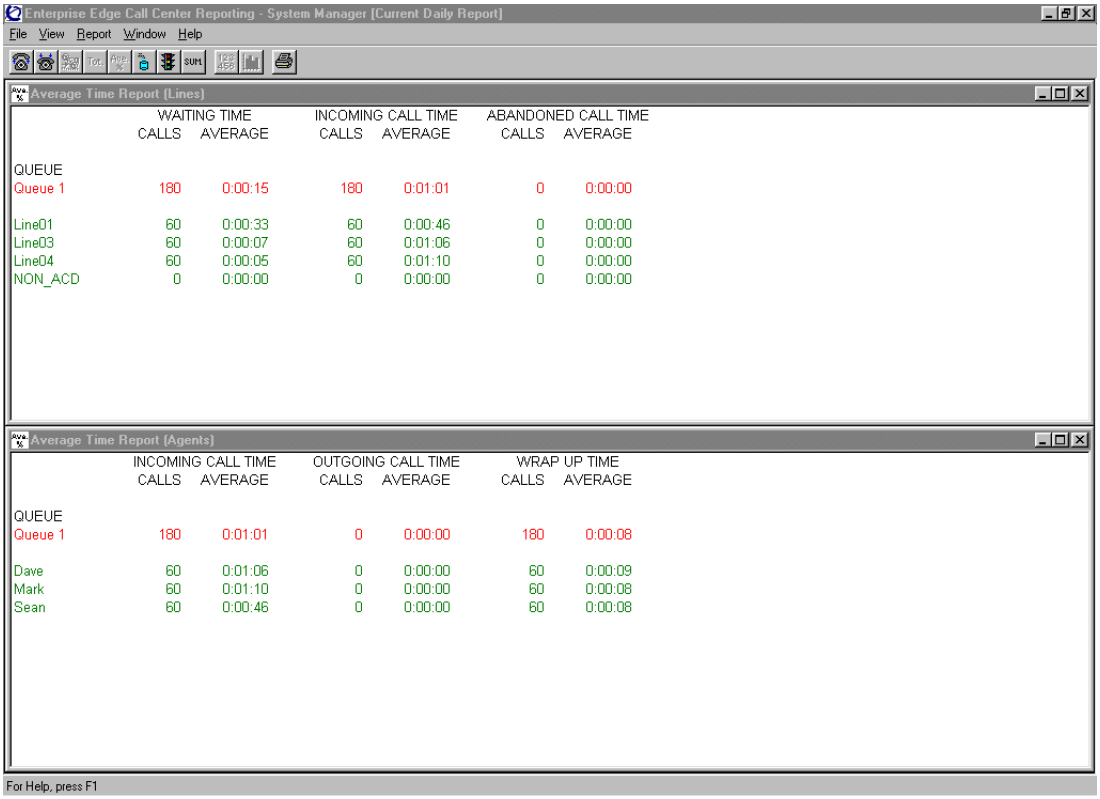
Agent Activity Report – Numerical View (Queue level)

The agent information includes:

Title	Description
LOG IN TIME	Time spent logged in to the Enterprise Edge 2.0 Call Center.
INCOMING TIME	Time spent on incoming calls.
OUTGOING TIME	Time spent on outgoing calls.
WRAP UP TIME	Time spent in post call wrap up.
BUSY TIME	Time spent in the make Busy state.
AVAILABLE TIME	Time spent available to make or receive calls.

Average Time Report

The **Average Time** Report displays the average time a caller waits prior to either being answered by an agent, or abandoning due to no answer. When viewed at System level the averages for both Queues can be compared. When viewed at Queue level this report shows the average incoming and outgoing call duration of each agent relative to the average of all agents.


Enterprise Edge Call Center Reporting - System Manager [Current Daily Report]
File View Report Window Help
Average Time Report [Lines]
WAITING TIME INCOMING CALL TIME ABANDONED CALL TIME
CALLS AVERAGE CALLS AVERAGE CALLS AVERAGE
QUEUE
Queue 1 180 0:00:15 180 0:01:01 0 0:00:00
Line01 60 0:00:33 60 0:00:46 0 0:00:00
Line03 60 0:00:07 60 0:01:06 0 0:00:00
Line04 60 0:00:05 60 0:01:10 0 0:00:00
NON_ACD 0 0:00:00 0 0:00:00 0 0:00:00
Average Time Report (Agents)
INCOMING CALL TIME OUTGOING CALL TIME WRAP UP TIME
CALLS AVERAGE CALLS AVERAGE CALLS AVERAGE
QUEUE
Queue 1 180 0:01:01 0 0:00:00 180 0:00:08
Dave 60 0:01:06 0 0:00:00 60 0:00:09
Mark 60 0:01:10 0 0:00:00 60 0:00:08
Sean 60 0:00:46 0 0:00:00 60 0:00:08
For Help, press F1

Average Time Report – Numerical (Queue level)

The line information includes:

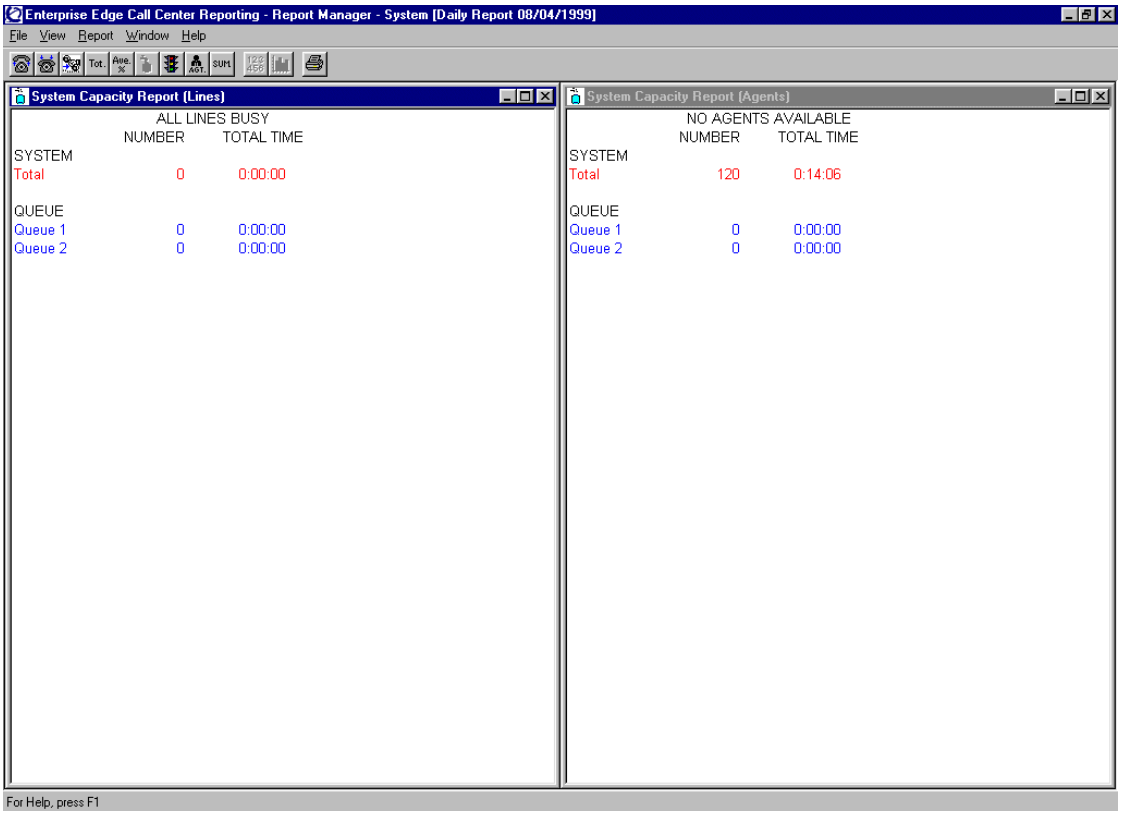
Title	Description
WAITING TIME -CALLS	Number of incoming calls answered.
WAITING TIME – AVERAGE	Average waiting time prior to being answered.
INCOMING CALL TIME – CALLS	Number of incoming calls answered.
INCOMING CALL TIME – AVERAGE	Average duration of an incoming call.
ABANDONED CALL TIME – CALLS	Number of incoming calls that abandon.
ABANDONED CALL TIME – AVERAGE	Average time a caller waits before abandoning.

The agent information includes:

Title	Description
INCOMING CALL TIME – CALLS	Number of incoming calls answered by agents.
INCOMING CALL TIME – AVERAGE	Average duration of an agent incoming call.
OUTGOING CALL TIME – CALLS	Number of outgoing calls made by agents.
OUTGOING CALL TIME – AVERAGE	Average call duration time of an agent outgoing call.
WRAP UP TIME – CALLS	Total number of incoming and outgoing calls made or received by agents.
WRAP UP TIME – AVERAGE	Average duration of each post-call wrap up time.

System Capacity Report

The **System Capacity** Report shows how often, and for how long, the call center was working at its maximum capacity. The line information shows the number of occasions when all lines were busy, and the total amount of time for which this condition prevailed. The agent information shows the number of times that there were no agents available and the total amount of time for the period.



System Capacity Report – Numerical View (System Level)

The line information includes:

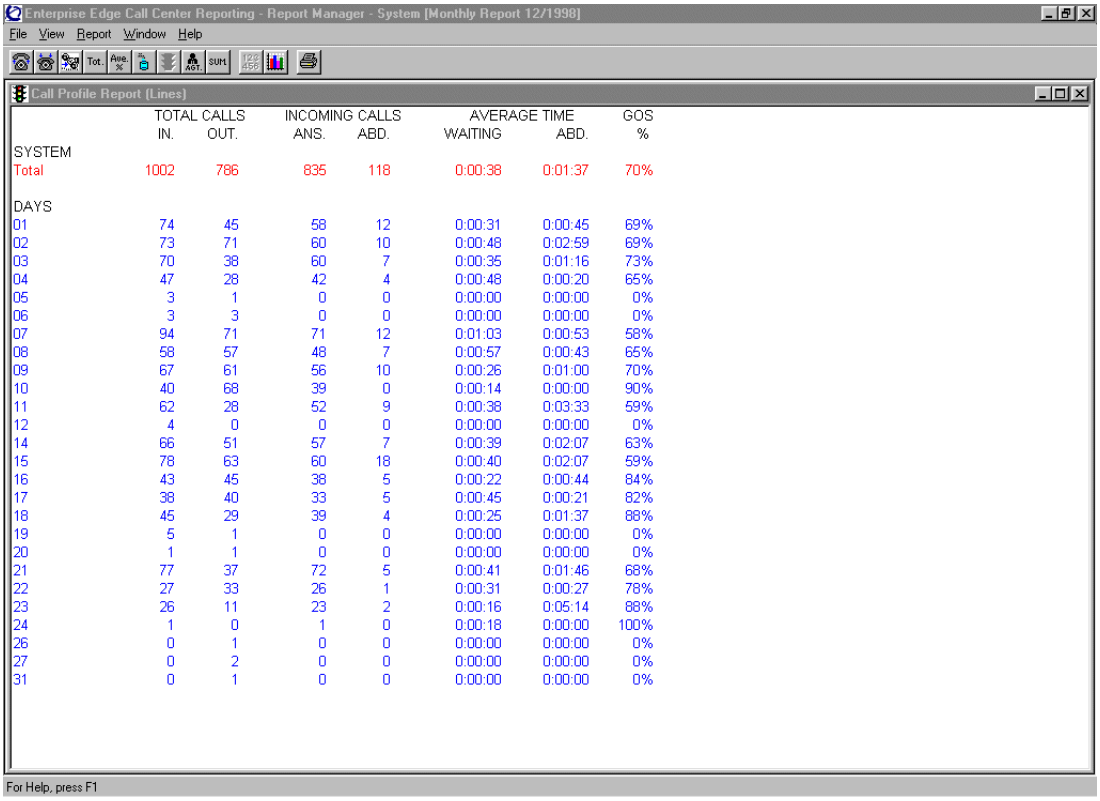
Title	Description
ALL LINES BUSY - NUMBER	Number of instances when all lines were in use on calls.
ALL LINES BUSY - TOTAL TIME	Total time that all lines were in use.

The agent information includes:

Title	Description
NO AGENTS AVAILABLE - NUMBER	Number of instances when there were no agents available to receive calls.
NO AGENTS AVAILAB - TOTAL TIME	Total time when there were no agents available to receive calls.

Call Profile Report

The **Call Profile** Report tracks the key performance statistics of your call center over a period of time. Peaks and troughs in traffic levels and service offered can be easily identified. Depending upon the time period selected for the report, and any Traffic Analysis settings, information will be shown either for every half-hour, hour or day. The information is shown for lines only.


Enterprise Edge Call Center Reporting - Report Manager - System [Monthly Report 12/1998]
File View Report Window Help
Call Profile Report (Lines)
For Help, press F1

	TOTAL CALLS IN.	TOTAL CALLS OUT.	INCOMING CALLS ANS.	INCOMING CALLS ABD.	AVERAGE TIME WAITING	AVERAGE TIME ABD.	GOS %
SYSTEM							
Total	1002	786	835	118	0:00:38	0:01:37	70%
DAYS							
01	74	45	58	12	0:00:31	0:00:45	69%
02	73	71	60	10	0:00:48	0:02:59	69%
03	70	38	60	7	0:00:35	0:01:16	73%
04	47	28	42	4	0:00:48	0:00:20	65%
05	3	1	0	0	0:00:00	0:00:00	0%
06	3	3	0	0	0:00:00	0:00:00	0%
07	94	71	71	12	0:01:03	0:00:53	58%
08	58	57	48	7	0:00:57	0:00:43	65%
09	67	61	56	10	0:00:26	0:01:00	70%
10	40	68	39	0	0:00:14	0:00:00	90%
11	62	28	52	9	0:00:38	0:03:33	59%
12	4	0	0	0	0:00:00	0:00:00	0%
14	66	51	57	7	0:00:39	0:02:07	63%
15	78	63	60	18	0:00:40	0:02:07	59%
16	43	45	38	5	0:00:22	0:00:44	84%
17	38	40	33	5	0:00:45	0:00:21	82%
18	45	29	39	4	0:00:25	0:01:37	88%
19	5	1	0	0	0:00:00	0:00:00	0%
20	1	1	0	0	0:00:00	0:00:00	0%
21	77	37	72	5	0:00:41	0:01:46	68%
22	27	33	26	1	0:00:31	0:00:27	78%
23	26	11	23	2	0:00:16	0:05:14	88%
24	1	0	1	0	0:00:18	0:00:00	100%
26	0	1	0	0	0:00:00	0:00:00	0%
27	0	2	0	0	0:00:00	0:00:00	0%
31	0	1	0	0	0:00:00	0:00:00	0%

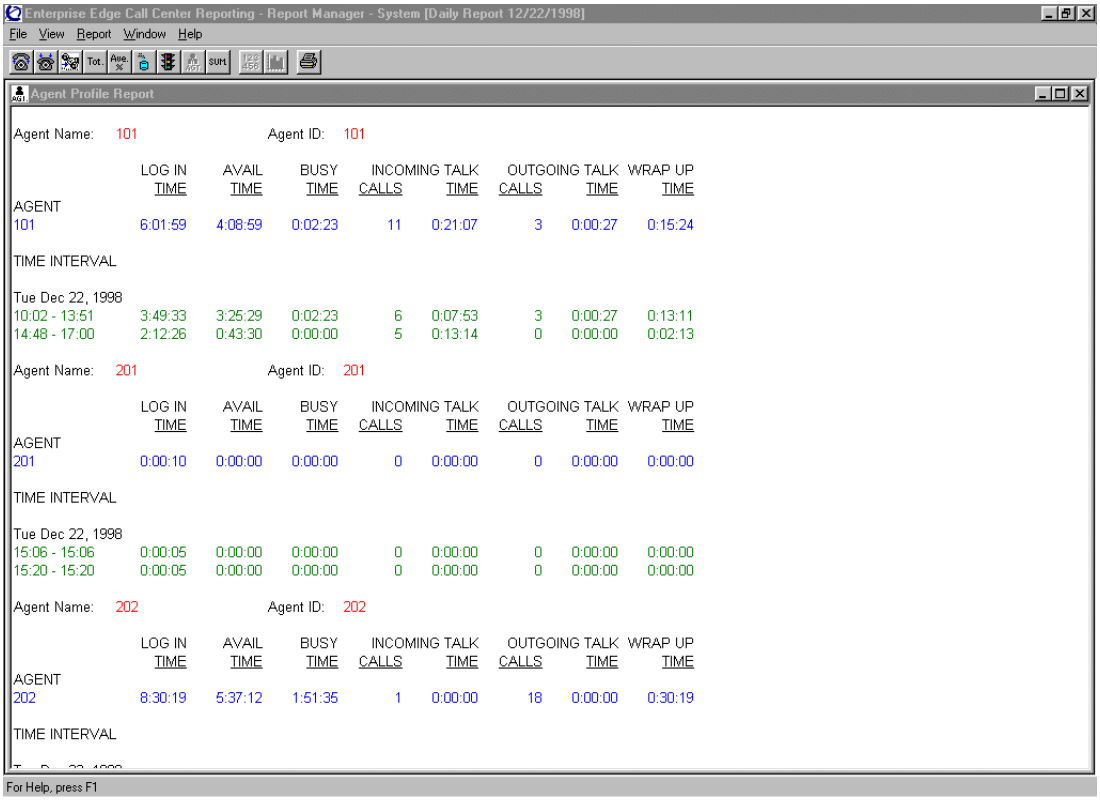
Call Profile Report – Numerical View

The line information contained within the Numerical Call Profile Report includes:

Title	Description
TOTAL CALLS - IN	Total number of incoming calls received.
TOTAL CALLS - OUT	Total number of outgoing calls made.
INCOMING CALLS - ANS.	Total number of incoming calls answered.
INCOMING CALLS - ABD.	Total number of incoming calls abandoning.
AVERAGE TIME - WAITING	Average time a caller waited before being answered.
AVERAGE TIME -ABD.	Average time a caller waited before abandoning.
GOS %	The Grade of Service figure - the percentage of calls answered within your service target time.

Agent Profile Report

The **Agent Profile** Report is only available from the System level. It provides detailed information on the activity of each individual agent. Use the **Agent Profile Report Range** options to specify which agents are required. Agent ID or Agent Name can be used to sort the information.


Enterprise Edge Call Center Reporting - Report Manager - System [Daily Report 12/22/1998]
File View Report Window Help
Agent Profile Report
Agent Name: 101 Agent ID: 101
LOG IN TIME | AVAIL TIME | BUSY TIME | INCOMING TALK CALLS | INCOMING TALK TIME | OUTGOING TALK CALLS | OUTGOING TALK TIME | WRAP UP TIME
AGENT
101 6:01:59 4:08:59 0:02:23 11 0:21:07 3 0:00:27 0:15:24
TIME INTERVAL
Tue Dec 22, 1998
10:02 - 13:51 3:49:33 3:25:29 0:02:23 6 0:07:53 3 0:00:27 0:13:11
14:48 - 17:00 2:12:26 0:43:30 0:00:00 5 0:13:14 0 0:00:00 0:02:13
Agent Name: 201 Agent ID: 201
LOG IN TIME | AVAIL TIME | BUSY TIME | INCOMING TALK CALLS | INCOMING TALK TIME | OUTGOING TALK CALLS | OUTGOING TALK TIME | WRAP UP TIME
AGENT
201 0:00:10 0:00:00 0:00:00 0 0:00:00 0 0:00:00 0:00:00
TIME INTERVAL
Tue Dec 22, 1998
15:06 - 15:06 0:00:05 0:00:00 0:00:00 0 0:00:00 0 0:00:00 0:00:00
15:20 - 15:20 0:00:05 0:00:00 0:00:00 0 0:00:00 0 0:00:00 0:00:00
Agent Name: 202 Agent ID: 202
LOG IN TIME | AVAIL TIME | BUSY TIME | INCOMING TALK CALLS | INCOMING TALK TIME | OUTGOING TALK CALLS | OUTGOING TALK TIME | WRAP UP TIME
AGENT
202 8:30:19 5:37:12 1:51:35 1 0:00:00 18 0:00:00 0:30:19
TIME INTERVAL
For Help, press F1

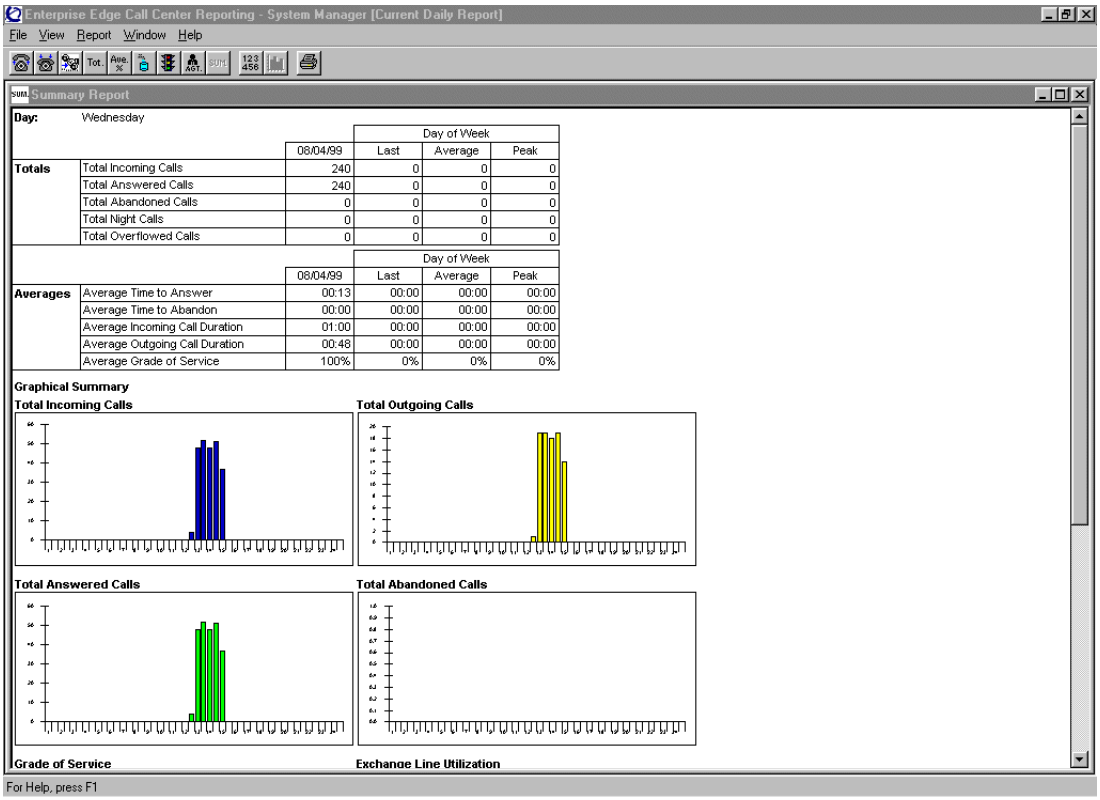
Agent Profile Report

The agent information includes:

Title	Description
TIME INTERVAL	Actual times for agent log in and log out.
LOG IN TIME	Total time the agent was logged in.
AVAILABLE TIME	Time the agent spent available.
BUSY TIME	Time the agent spent in make busy.
INCOMING TALK – CALLS	Number of incoming calls the agent answered.
INCOMING TALK – TIME	Time the agent spent on incoming calls.
OUTGOING TALK – CALLS	Number of outgoing calls made by the agent.
OUTGOING TALK – TIME	Time the agent spent on outgoing calls.
WRAP UP – TIME	Time the agent spent in post-call wrap up

Summary Report

The objective of the **Summary** report is to provide, on a single page, a complete summary of the call center activity and performance during the defined period. The period covered by the report can be daily, weekly or monthly. The report highlights, in both graphical and numerical formats, key statistics such as abandoned calls, Grade of Service and call waiting times. The peak and average performance figures are shown for comparison.


Enterprise Edge Call Center Reporting - System Manager [Current Daily Report]
File View Report Window Help
Summary Report
Day: Wednesday
Day of Week
08/04/99 Last Average Peak
Totals
Total Incoming Calls 240 0 0 0
Total Answered Calls 240 0 0 0
Total Abandoned Calls 0 0 0 0
Total Night Calls 0 0 0 0
Total Overflowed Calls 0 0 0 0
Day of Week
08/04/99 Last Average Peak
Averages
Average Time to Answer 00:13 00:00 00:00 00:00
Average Time to Abandon 00:00 00:00 00:00 00:00
Average Incoming Call Duration 01:00 00:00 00:00 00:00
Average Outgoing Call Duration 00:48 00:00 00:00 00:00
Average Grade of Service 100% 0% 0% 0%
Graphical Summary
Total Incoming Calls
Total Outgoing Calls
Total Answered Calls
Total Abandoned Calls
Grade of Service
Exchange Line Utilization
For Help, press F1

Summary Report – Graphical View

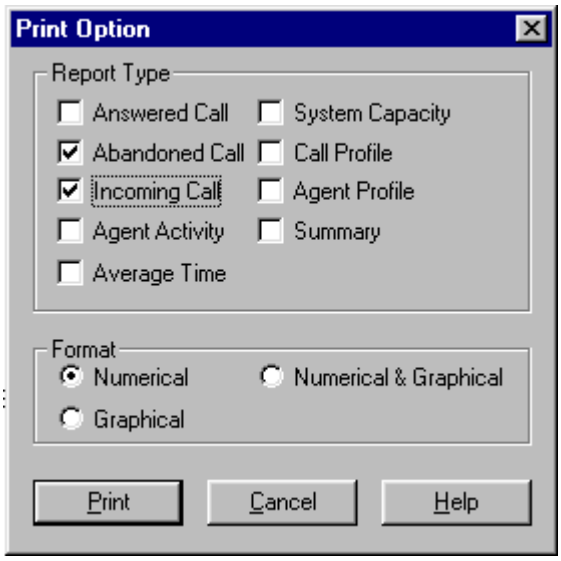
Printing reports

Reports may be printed on demand from the Report Manager window.

Printouts can also be scheduled to print at certain time on chosen day, every week or month using the **Print Schedule** option. Print scheduling is described in detail later in this chapter.

To print a report from the Report Manager window:

1. Click **File** from the menu bar.
2. Select **Print…**. This will open the **Print Option** window.



The Print Option window

3. Click the **Report Type**(s) to be printed.

4. Click the **Format** required.

5. Click **Print**.

Note: If a **Graphical** format is chosen for any reports that are only available in a numerical format, the report will not print.

Abandoned Caller ID Report

The Abandoned Caller ID Report provides a detailed record of all abandoned calls. The system stores Abandoned Caller ID information for seven days, (this includes the current day). The most current information automatically replaces the oldest information. This report is only available for individual Queues, not for the System level.

To view the Abandoned Caller ID Report:

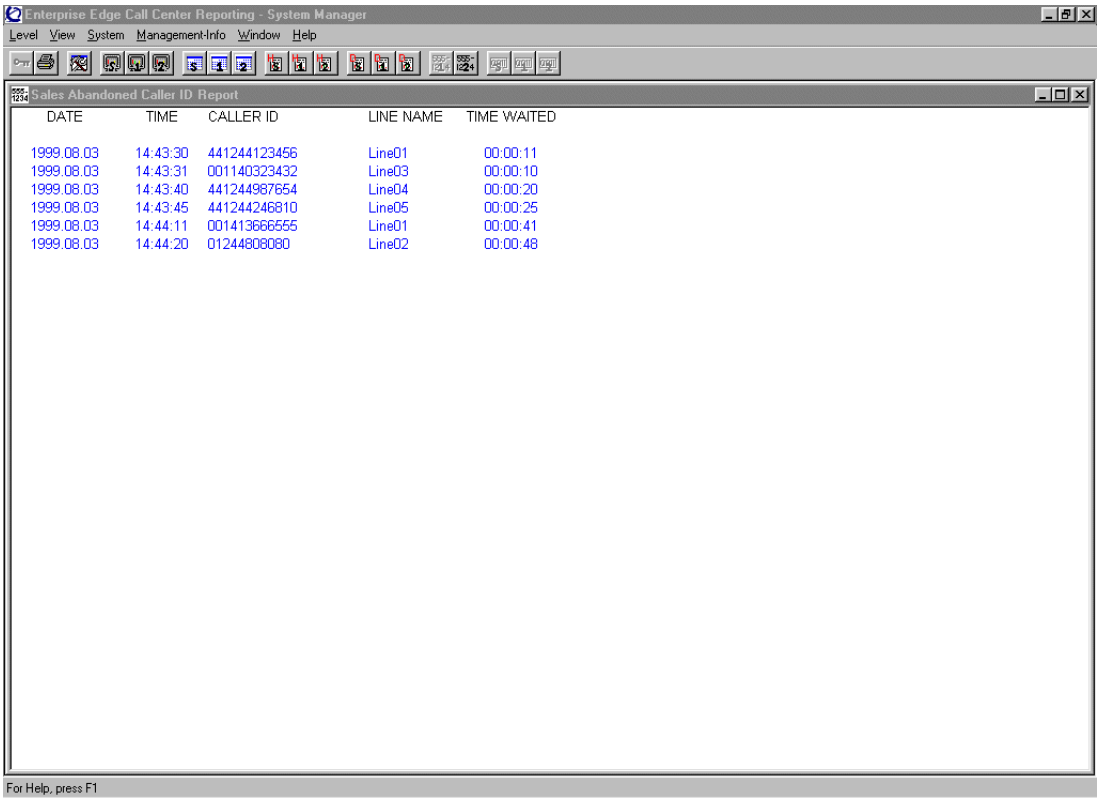
1. From the System Manager Main window, click **Management-Info**.

2. Select **Queue 1** or **Queue 2** as required.

3. Click on **Abandoned Caller ID Report…**.

4. Select the day required.

5. Click **Open**.



The Abandoned Caller ID Report

The information displayed includes:

Title	Description
DATE	Date the call arrived.
TIME	Time the call arrived.
CALLER ID	Telephone number of the caller who abandoned.
LINE NAME	Line name the caller was attempting to contact.
TIME WAITED	Time the caller waited prior to abandoning.

To print the Abandoned Caller ID Report:

1. With the report open on the screen, click **Level**.
2. Click **Print…**.

The report will now be printed.

Printouts can also be scheduled to print automatically at time intervals from every 30 minutes to once every 24 hours. Refer to the **Print Schedule** option, which is described in detail later in this chapter.

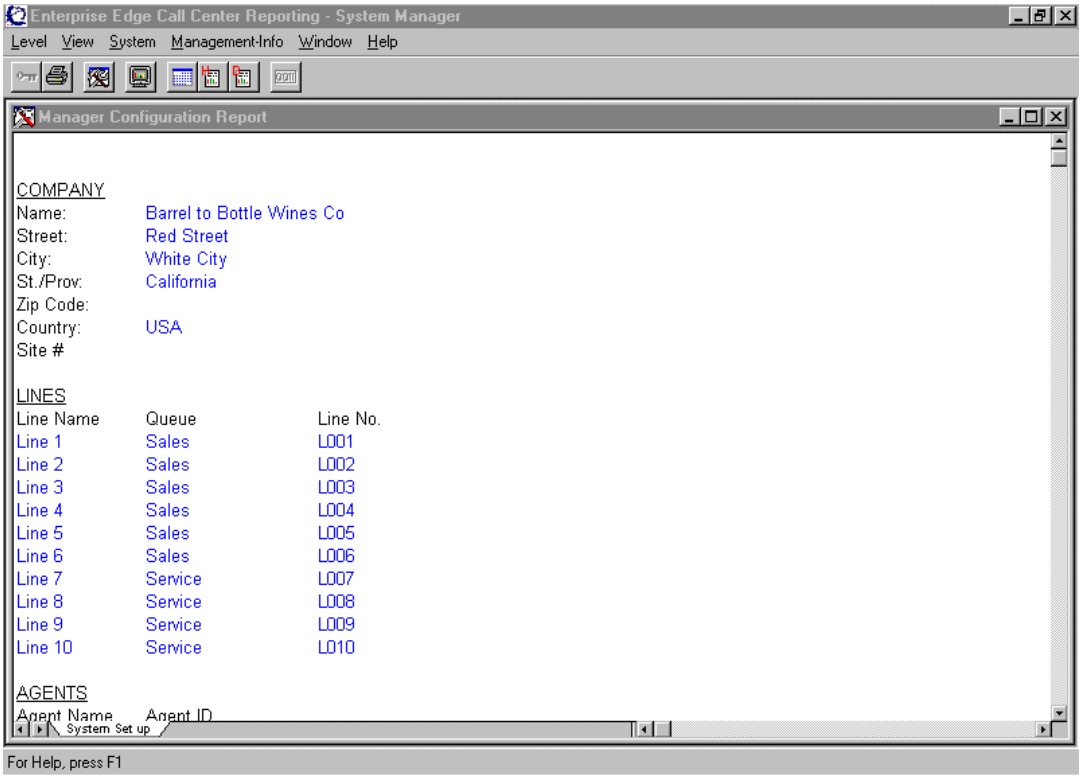
Configuration Report

This report will display all the configuration settings of your Enterprise Edge 2.0 Call Center Reporting system (at System Manager level, 900) or the configuration settings for your Queue (at Queue level, 901 … 916).

To view the Configuration Report:

1. Click **Management-Info** from the System Manager Main window.
2. Select **System**.
3. Click **Configuration Report**.

The configuration settings can be displayed for the **System** or for each **Queue** by clicking on the tabs at the bottom of the window.



The Configuration Report

To print the Configuration Report:

1. Click **Level** from the System Manager Main window.
2. Click **Print…**.

Note: The Configuration Report is only available for printing while the report is open on the screen.

Print Schedule

Management reports can be scheduled to print out automatically at a set time. For example, reports can be printed at night when the call center is closed, or once a month for the previous month.

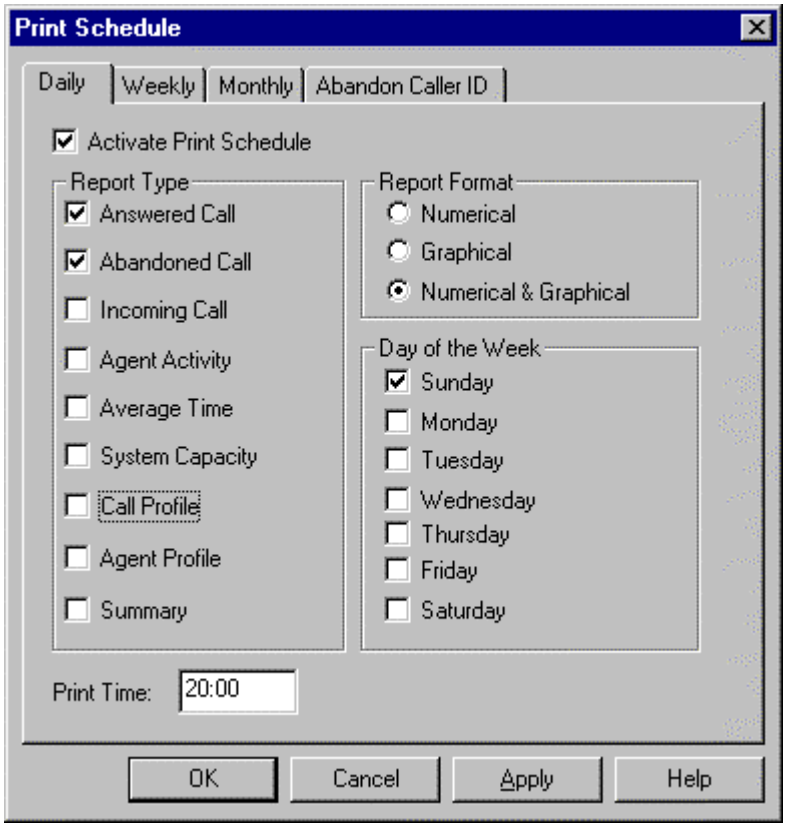
The Abandoned Caller ID Report can be scheduled to print more frequently due to the significance of the information.

Scheduled printing is set up from the System Manager Main window.

To schedule a print run:

1. Click **Management-Info** on the menu.

2. Click **Print Schedule**. This will open the Print Schedule window.



Print Schedule window

3. Click **Activate Print Schedule** on the **Daily**, **Weekly** and **Monthly** tabs as required.

4. Click the **Report Type** to be printed in this schedule.

5. Click the **Report Format** required.

   Note: If the **Graphical** option is chosen then those reports that are only available in a numerical format will appear greyed out, and will not be printed.

6. Click the day and/or time as required.

   Note: For Daily and Weekly schedules, a day and time must be entered. For Monthly schedules, a time must be entered, as the day will automatically be set to the first day of the following month.

7. Click the **Abandoned Caller ID** tab and select a time **Interval** for printing the Abandoned Caller ID report. Note that the Abandoned Caller ID report is only available at Queue level (901 .. 916)

8. Click **OK** to save the Print Schedule.

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